Facilities Management
Quarterly Strategic Planning Session

First Quarter – Fiscal Year 2017
July – September 2016

AGENDA

Opening – Phil Jones
Personnel Discussion
Strategic Planning Metrics and Actions Plans
Wrap Up and Look Ahead – Phil Jones

…Creating a Campus of Distinction
Strategic Planning Session
Facilities Management’s Goals

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

...Creating a Campus of Distinction
GOAL #1

Continuously Improve Operations of Campus

"When a team outgrows individual performance and learns team confidence, excellence becomes a reality.

-- Joe Paterno
Facilities Management Strategic Planning Session – First Quarter FY 2017

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. Daily assignment; coordinating and monitoring of work effort.
2. Continue assignment of lead technician in absence of supervisor.
3. FM to select company for the RFP “Work Order Process Improvement.” (October 2016)
4. Realigning Utilities Manager and supporting units
5. Craftsperson Work Request Board

**Actions Completed**
1. Weekly review of work order assignments.
2. Work with FBO and FIS to finalize RFP “Work Order Process Improvement”
3. Realigned Admin Support Group; phasing in processes
4. Hired Utility Manager, Lead Admin Support and other positions
5. Worked with FIS to develop snapshot of Work Order Status
Facilities Management Strategic Planning Session – First Quarter FY 2017

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

Wrench Time

Goal = Maintain Wrench Time at 70%
Facilities Management Strategic Planning Session – First Quarter FY 2017

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. Continue to identify items that have been repeatedly ordered as non-stock items to become stock items; continue to streamline existing stock inventory.

2. Monitor daily tracking of long lead items and spikes in usage (historically the main causes for inability to fill).

3. Continue to send out daily email reminders for approvers (Supervisors, Admins and Managers).

4. Continue to monitor the requisition to PO processing time.

5. Pilot program for Google Group email notification.

Actions Completed

1. Assigned additional approvers to help expedite the process.

2. Streamlined stock inventory
Facilities Management Strategic Planning Session – Fourth Quarter FY 2017

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

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

- 1st Qtr FY17: 95.00%
- 2nd Qtr FY17: 95.00%
- 3rd Qtr FY17: 95.00%
- 4th Qtr FY17: 95.00%
- Annual Average: 95.00%

Goal to 95%
Facilities Management Strategic Planning Session – First Quarter FY 2017

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
Facilities Management Strategic Planning Session – First Quarter FY 2017

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. Bi-weekly review of recurring services and scheduled services currently being completed using PM work request.
2. Daily check and balance of completed work orders.
4. Supervisors meeting with technicians on a daily basis to prioritize work assignments.
5. Develop and implement White Board Work Request Status Report (October 2016)

Actions Completed

1. Reduced active work orders on 14 Day Report by 40%.
2. Implemented White Board Work Request Status Report in September 2016
Facilities Management Strategic Planning Session – First Quarter FY 2017

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>Quarter</th>
<th>Number of Work Orders</th>
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<tbody>
<tr>
<td>1st Qtr FY17</td>
<td>1202</td>
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<tr>
<td>2nd Qtr FY17</td>
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<td>3rd Qtr FY17</td>
<td>900</td>
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<tr>
<td>4th Qtr FY17</td>
<td>800</td>
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<tr>
<td>Annual Average</td>
<td>910</td>
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</tbody>
</table>

Goal equals < 15% (891)
Facilities Management Strategic Planning Session – First Quarter FY 2017

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
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
  – Began BES&R Intranet Pilot (8/2016)
  – Hiring Process Draft (8/2016)
  – Initial Workloading of McEniry Building (8/2016)

• Actions Planned
  – CCAP Classroom Renovation Pilot (11/2016)
  – (Part III) Attend Workloading Workshop (11/2016)
  – Complete Hiring Process/Flow Chart (11/2016)
  – (2nd Iteration) Workload McEniry building (11/2016)
  – Implement new quarterly self-audit process in Archibus – Monthly inspection of PMs per building (12/2016)
  – Workload Bioinformatics building (12/2016)
  – Implement In-service training curriculum and matrix (12/2016)
  – Develop Standard Operating Procedures Manual (SOP) for BES&R (ongoing)
  – Implement High Performance Team Cleaning (ongoing)
Facilities Management Strategic Planning Session – First Quarter FY 2017

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

Percentage = 67%
(OS1) Baseline Audit Scores - Job Category

Percentage

Cleaning Wrkr. 8%  8%
Training 8%  8%
Safety 9%  9%
Workloading/Logistics 6%  6%
Supervision/Management 9%  9%
Benchmarking 8%  8%

Legend:
- Cleaning Wrkr.
- Training
- Safety
- Workloading/Logistics
- Supervision/Management
- Benchmarking
Facilities Management Strategic Planning Session – First Quarter FY 2017

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. Realign PM Program; complete conversion from old PM Module to new PM Module. (3rd Qtr FY 17)
2. Continue expansion of PM Program; Work with key customers (Aux Svs)
3. Restructure the Archibus PM Equipment Manager module.
4. Integrate BIM into all Capital Projects (March 2017)
   A. Hire Consultant (January 2017)
   B. Hire In-House staff? (March 2017)
5. FCAP is identifying and prioritizing equipment conditions and needs, for replacement. This information is used to support CRDM projects.

Actions Completed

1. Incorporated FCAP inspection process into CRDM and Daily Operations.
2. Recruited an engineering student
Facilities Management Strategic Planning Session – First Quarter FY 2017

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

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**Improve Completion of PM Work Orders**

- **Goal to 90%**
- **1st Qtr FY17: 83.5%**
- **Goal to 90%**
- **Annual Average: 83.5%**
Facilities Management Strategic Planning Session – First Quarter FY 2017

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

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<th>1.00</th>
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<tr>
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</tbody>
</table>
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

Goal = Less than 5 incidents/Qtr
Facilities Management Strategic Planning Session – First Quarter FY 2017

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>
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<th>Quarter</th>
<th>Percentage</th>
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<td>4th Qtr FY17</td>
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<td>Annual Average</td>
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</table>

Goal to Improve Ratio to 50%
GOAL #2

Create a Reliable and Sustainable Physical Infrastructure

Great leaders help their people see how they can directly impact the company's objectives and their own personal goals.

Chip Conley
<table>
<thead>
<tr>
<th>FM Prioritized Projects – FY17</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Mobile PM &amp; WR – Estimated Completion Jun 15, 2017</td>
</tr>
<tr>
<td>2. GIS Master Plan Map – Estimated Completion Jun 30, 2017</td>
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<tr>
<td>3. ARCHIBUS Work Order Reinvention – Estimated Completion Jun 30, 2017</td>
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<tr>
<td>4. ARCHIBUS Upgrade 23.1 – Estimated Completion Nov 8, 2016</td>
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<tr>
<td>6. BAS Website Upgrade – Estimated Completion Jun 30, 2017</td>
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<tr>
<td>7. GIS Dept. Map – Estimated Completion Apr 30, 2017</td>
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<tr>
<td>8. GIS Wayfinding Signage – Estimated Completion Jun 30, 2017</td>
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<tr>
<td>11. ARCHIBUS Training: Transition to CANVAS – Estimated Completion May 1, 2017</td>
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<tr>
<td>12. Mobile Floor Plans – Estimated Completion Jun 1, 2017</td>
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<tr>
<td>15. ADA Pathways Phase 1 &amp; 2 – Phase 1 Completed; Phase 2 Est. Completion Feb 10, 2017</td>
</tr>
<tr>
<td>16. Impervious Layer Clean-up/Updates – Estimated Completion Jun 30, 2017</td>
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<tr>
<td>17. FM Screens &amp; Banner Asset 2017 Inventory – Estimated Completion Mar 15, 2017</td>
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<tr>
<td>19. WO Assignment status board – Completed Sept 1, 2016</td>
</tr>
<tr>
<td>22. ARCHIBUS Survey Reports Improvements – Estimated Completion Nov 23, 2016</td>
</tr>
<tr>
<td>24. Mobile Intent Reinvention – Estimated Completion Apr 10, 2017</td>
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<tr>
<td>27. CRDM 3rd Generation – Estimated Completion Apr 10, 2016</td>
</tr>
<tr>
<td>28. Database Migration to ITS – Estimated Completion Mar 20, 2017</td>
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<tr>
<td>30. Dropbox for Asset Management (BIM) – Estimated Completion Jun 30, 2017</td>
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</tbody>
</table>

Other Projects (Not Calculated) |
1. BAS N4 Website Upgrade |
2. Key Management Module |
3. Equipment Maps |
4. ARCHIBUS Card Access Integration |
5. Campus Outdoor Lighting Controls |
6. SDI Enhancements |
7. BES Mobile App |
8. Dropbox Records Mgmt. for Design Services |
9. Space Mgmt. Reports |
10. Project Mgmt. Tools |
11. ARCHIBUS Testing Framework |
Facilities Management Strategic Planning Session – First Quarter FY 2017

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 Average

1st QTR GOAL

18.67%
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 Weighted Project Average Completion

Qtr 1 FY17: 17.88%

Qtr 2 FY17

Qtr 3 FY17

Qtr 4 FY17

1st QTR GOAL

Percent Completion

FIS Lead

Qtr 1 FY17

Qtr 2 FY17

Qtr 3 FY17

Qtr 4 FY17

Lead

FIS
Facilities Management Strategic Planning Session – First Quarter FY 2017

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

<table>
<thead>
<tr>
<th>Project</th>
<th>FY17 Q1</th>
<th>FY17 Q2</th>
<th>FY17 Q3</th>
<th>FY17 Q4</th>
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<tr>
<td>WO Assignment Board</td>
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<td>FM Hardware Setups/Distribution</td>
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<td>Water Valve Survey</td>
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<td>ADA Paths Survey 1 &amp; 2</td>
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<td>ARCHIBUS Upgrade 23.1</td>
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<td>FM Windows 10 Upgrades</td>
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<td>Estimating Workbook</td>
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<td>FM Screens &amp; Banner Assets</td>
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<td>Impervious Layer Clean Up/Updates</td>
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<td>ARCHIBUS Training in CANVAS</td>
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<td>Security Updates</td>
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<td>GeoDatabase Cleanup</td>
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<td>GIS Publishing Rules</td>
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<td>NonAssignible Area</td>
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<td>Remote Key Admins</td>
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<td>Mobile Intent Reinvention</td>
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<td>Work Order Process Reinvention</td>
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<td>Mobile PM &amp; WR for Ipad</td>
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<td>Training Workflow</td>
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<td>Mobile FloorPlans</td>
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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:

4. Complete Final PC set up and distribution by Dec 1, 2016.
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 Completed:

5. Scheduled user set up, issue resolution and follow up support for a total of 119 Facilities Management DELL Computer Distributions installed from July 1, 2016 through Aug 30, 2016.
Facilities Management Strategic Planning Session – First Quarter FY 2016

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.) |

| Tactic 2.2.2: | Review Project Capacity - Goal 250 projects per year. |
| Measure: | Number of Projects Completed (Annual Goal) |

**ACTION PLANS FOR IMPROVEMENT**

**NEW IMPROVEMENTS**

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

- Updates to Estimating Workbook to include Direct Pay for Capital & Special Purchases).
  - **Timeline:** **FY17 QTR 2**

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:** **FY17 QTR 2 - FY17 QTR 4 – Work In Progress**

**ONGOING IMPROVEMENTS**

- Continue ongoing efforts to assign Classroom Capacity and provide ADA egress information per building.
Facilities Management Strategic Planning Session – First Quarter FY 2016

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.)

95% of All Construction Projects Meet Scheduled Beneficial Occupancy Date (BOD)

<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>
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<td>Q 1</td>
<td>28</td>
<td>27</td>
<td>1</td>
<td>96.4%</td>
</tr>
<tr>
<td>Q 2</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.0%</td>
</tr>
<tr>
<td>Q 3</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.0%</td>
</tr>
<tr>
<td>Q 4</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.0%</td>
</tr>
<tr>
<td>FY17 STATUS</td>
<td>28</td>
<td>27</td>
<td>1</td>
<td>96.4%</td>
</tr>
</tbody>
</table>

Annual Goal 95%

QTR 1 Status 96.4%

FY17 Status 95%
Facilities Management Strategic Planning Session – First Quarter FY 2017

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: Refine FCI tracking method to illustrate changes over time (by quarter) and use this information as a tool for recommending projects to improve campus FCI by 5% NLT July 2017.

Lead: Facilities Planning
Balanced Scorecard Category: Internal Business Process

ACTION PLAN

- Continue to update CRDM data (ongoing)
- Integrate feedback from users of CRDM map and master list (ongoing)
- Update FCI tracker by building to capture FCAP changes and project completions to calculate movement in FCI (ongoing)
- Provide status and recommendations to attain a 5% improvement (July 2017)
- Developed “Third Generation” CRDM – Forecasting reports for roofs (July 2017)
Facilities Management Strategic Planning Session – First Quarter FY 2017

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: Refine FCI tracking method to illustrate changes over time (by quarter) and use this information as a tool for recommending projects to improve campus FCI by 5% NLT July 2017.

Measure: Average Building FCI for campus

Lead: Facilities Planning
Balanced Scorecard Category: Internal Business Process
Facilities Management Strategic Planning Session – First Quarter FY 2017

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
  o Continue to collaborate with Financial Services, the administration, and customers on the funding of the 5-Year Capital Plan.
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
- Facilities Operations/Parking Services, Science Building, Union Deck, Academic Complex

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 – accurate, used weekly by PMs & CMs
- 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 – 1st Quarter FY 2017

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</th>
<th>Designer not under contract w/in 120</th>
<th>% Designers under contract</th>
</tr>
</thead>
<tbody>
<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>7</td>
<td>5</td>
<td>1</td>
<td>83%</td>
</tr>
<tr>
<td>Summary FY-16</td>
<td>6</td>
<td>4</td>
<td>2</td>
<td>67%</td>
</tr>
<tr>
<td>1st Qtr. FY-17</td>
<td>1</td>
<td>2</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>2nd Qtr. FY-17</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0%</td>
</tr>
<tr>
<td>3rd Qtr. FY-17</td>
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<td>0</td>
<td>0</td>
<td>0%</td>
</tr>
<tr>
<td>4th Qtr. FY-17</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0%</td>
</tr>
</tbody>
</table>

Tactic Measurement for 1st Quarter is 100%
Facilities Management Strategic Planning Session – 1st Quarter FY 2017

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 time</th>
<th>#not completed by scheduled time</th>
<th>% Designs complete by completion time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summary FY-14</td>
<td>8</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>Summary FY-15</td>
<td>3</td>
<td>1</td>
<td>75%</td>
</tr>
<tr>
<td>Summary FY-16</td>
<td>7</td>
<td>3</td>
<td>70%</td>
</tr>
<tr>
<td>1st Qtr. FY-17</td>
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<td>100%</td>
</tr>
<tr>
<td>2nd Qtr. FY-17</td>
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<td>0%</td>
</tr>
<tr>
<td>3rd Qtr. FY-17</td>
<td>0</td>
<td>0</td>
<td>0%</td>
</tr>
<tr>
<td>4th Qtr. FY-17</td>
<td>0</td>
<td>0</td>
<td>0%</td>
</tr>
</tbody>
</table>

Tactic Measurement for 1st Quarter is 100%
Facilities Management Strategic Planning Session – 1st Quarter FY 2017

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-14</td>
<td>6</td>
<td>1</td>
<td>85%</td>
</tr>
<tr>
<td>Summary FY-15</td>
<td>3</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>Summary FY-16</td>
<td>9</td>
<td>1</td>
<td>90%</td>
</tr>
<tr>
<td>1st Qtr. FY-17</td>
<td>1</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
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<td>0</td>
<td>0</td>
<td>100%</td>
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<td>3rd Qtr. FY-17</td>
<td>0</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>4th Qtr. FY-17</td>
<td>0</td>
<td>0</td>
<td>100%</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

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)

ACTION PLAN

Actions Complete
• Hauser Alumni Pavilion Sewer, Parking Lot 11A Expansion

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
• 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.
• Manage construction scope creep
Facilities Management Strategic Planning Session – 1st Quarter FY 2017

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-14</td>
<td>6</td>
<td>3</td>
<td>67%</td>
</tr>
<tr>
<td>Summary FY-15</td>
<td>5</td>
<td>3</td>
<td>63%</td>
</tr>
<tr>
<td>Summary FY-16</td>
<td>3</td>
<td>5</td>
<td>38%</td>
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<tr>
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<td>2</td>
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<td>100%</td>
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<tr>
<td>2nd Qtr. FY-17</td>
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<td></td>
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<td>3rd Qtr. FY-17</td>
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</tr>
<tr>
<td>4th Qtr. FY-17</td>
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<td></td>
</tr>
</tbody>
</table>

Tactic Measurement for 1st Quarter is 100%
Facilities Management Strategic Planning Session – 1st Quarter FY 2017

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 construction contract amount or Guaranteed Maximum Price (GMP) plus 3% new construction 5% renovation (contingency).

Balanced Scorecard Category: Internal Business Process

<table>
<thead>
<tr>
<th>STRATEGIC REVIEW by Fiscal Year (July-June)</th>
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<th>not completed on schedule</th>
<th>% completed on time</th>
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<td>67%</td>
</tr>
<tr>
<td>Summary FY-15</td>
<td>4</td>
<td>2</td>
<td>67%</td>
</tr>
<tr>
<td>Summary FY-16</td>
<td>3</td>
<td>5</td>
<td>38%</td>
</tr>
<tr>
<td>1st Qtr. FY-17</td>
<td>2</td>
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<td>100%</td>
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<tr>
<td>2nd Qtr. FY-17</td>
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<td>3rd Qtr. FY-17</td>
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</tr>
<tr>
<td>4th Qtr. FY-17</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
</tbody>
</table>

Tactic Measurement for 1st Quarter is 100%
Facilities Management Strategic Planning Session – First Quarter FY 2017

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure
Objective: 2.9: Develop a strategic plan for supporting research facilities, including installation of adequate redundant infrastructure to ensure continuous daily support
(Action Plan only)

Lead: Facilities Operations
Balanced Scorecard Category: Customer Perspective

ACTION PLAN

Actions Planned

1. Construction of a new sub station (2018); Phase I funding approved; includes advanced planning
2. Continue monthly and annual PM service on generators
3. Implement Generator Load Bank Testing program (Funding approval October 2016)
4. Implement Fuel Polishing program (2017)
5. Implement Di-electric Oil Testing on transformers (2018)

Actions Completed

1. Completed monthly and annual generator PM’s (2015)
2. Hired Utility Manager (July 2016)
GOAL #3

Foster a Customer Focused Organization

In business, the idea of measuring what you are doing, picking the measurements that count like customer satisfaction and performance... you thrive on that.

Bill Gates
GOAL #3 Foster a Customer Focused Organization

Objective 3.1: Continuously improve customer service/satisfaction

Tactic 3.1.1: Achieve overall customer satisfaction of 93% 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

Overall Satisfaction with Facilities Management Services

Goal = 90%

<table>
<thead>
<tr>
<th>Year</th>
<th>Overall Satisfaction (%)</th>
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</thead>
<tbody>
<tr>
<td>FY 2008</td>
<td>69</td>
</tr>
<tr>
<td>FY 2010</td>
<td>89</td>
</tr>
<tr>
<td>FY 2012</td>
<td>91</td>
</tr>
<tr>
<td>FY 2014</td>
<td>93</td>
</tr>
<tr>
<td>FY 2016</td>
<td>90.6</td>
</tr>
</tbody>
</table>
GOAL #3  Foster a Customer Focused Organization

Objective 3.1:  Continuously improve customer service/satisfaction

<table>
<thead>
<tr>
<th>Tactic 3.1.1:</th>
<th>Achieve overall customer satisfaction of 93% (proposed) for FM services.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Measure:</td>
<td>Annual Customer Survey results: Percentage of customers selecting “fair, good or very good” with the statement: “Overall I am satisfied with &lt;the service&gt; I received from Facilities Management”</td>
</tr>
</tbody>
</table>

Lead: Facilities Management Wide
Balanced Scorecard Category: Customer Perspective

ACTION PLAN FOR IMPROVEMENT

Publicity/Public Relations:
- **Campus Construction Reports**: Prepare and distribute every four weeks. Last completed 10/16, next 11/16
- **News Releases**: Write and distribute through several media channels. Continual
  - New LEAF, motor fleet addition; and human interests story about Brent Offenberger
- **Publicity documentation and analytics**: Will continue to work with Cindy Tribucher on analytics; goal is to increase external media (in particular, trade publications) coverage.

Internal Communications:
- **Intranet and Web Site** Content review and user feedback. (note: level 0 security information) Began working alongside FIS to begin a pilot phase of Confluence and assess the needs of BES and Operations.
Facilities Management Strategic Planning Session – First Quarter FY 2017

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. Continue to work with customers; educate them on the UNCC Temperature Control Policy and monitor requests for accuracy
2. Continue to develop BAS Controls section and cross-train with Zones
3. Hire Lead BAS Technician (Reposting October 2016)
4. Continue to include Energy Manager in Bi-Weekly Operations’ meetings
5. Ongoing discussions with FIS re campus wide analytics (BAS Dashboard)
6. Develop Utilities Team and Retro Commissioning Supervisor (November 2016)
7. Working with Capital; Retro-commissioning 3 buildings (Cameron, McEniry, Smith) (June 2016)
8. Working with Capital; Mechanical Systems Upgrade Project (Kennedy)
9. Feedwater pump replacement (System Reliability) (October 2016)
10. Develop and implement customer follow-up plan (Call backs)

**Actions Completed**

1. Implemented daily monitoring of temperature using BAS and field verification.
2. Updated temperature policy (July 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

Goal = Decrease Number by 20% (145 Total)
Facilities Management Strategic Planning Session – First Quarter FY 2017

GOAL #3 – Foster a Customer Focused Organization

Objective: 3.1: Continuously improve customer service/satisfaction

Lead: Design Services

Balanced Scorecard Category: Internal Business Process

<table>
<thead>
<tr>
<th>Tactic 3.1.3:</th>
<th>90% of Informal Project Customers are satisfied or very satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Measure:</td>
<td>Results from Archibus – Design Services Projects Customer Survey</td>
</tr>
</tbody>
</table>

**ACTION PLANS FOR IMPROVEMENT**

Archibus - Design Services Customer Survey:

**Actions taken by Members of the Design Services Team & Results of Actions:**

- Stop by Customers after the project is complete and in use to review how the renovated space is performing. Received excellent feedback; this helps the design and finish options going forward on other projects.

- Keeping the communication lines open by email, phone and face to face works wonders.

- Sending daily construction field reports has been working for one very “hands on” Customer.

- Hold weekly meetings on job site to discuss progress with Customer. Customers enjoy getting to see the project and discuss any issues or concerns face to face.

- Each Customer is unique and so must be the way I communicate with them. Sometimes it's face to face, other times email or a phone call. It also depends on what needs to be discussed. The process is simple to state and difficult to master; effective communication is not easy.
Facilities Management Strategic Planning Session – First Quarter FY 2017

GOAL #3 – Foster a Customer Focused Organization

Objective: 3.1: Continuously Improve Customer Service and Satisfaction

Lead: Design Services

Balanced Scorecard Category: Internal Business Process

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

Measure: Results from Project Related Customer Surveys

Customer Comment:

Example of One “Less than Satisfied” Customer Comment:

Communication with our project coordinator and the subcontractors was lacking and led to work being done incorrectly or not at all. Regular meetings are highly recommended for all projects, but particularly for projects that are unique in nature and scope.
Facilities Management Strategic Planning Session – Fourth Quarter 2016

GOAL #3  Foster a Customer Focused Organization

Objective 3.1:  Continuously improve customer service/satisfaction

| Tactic 3.1.5: | Build brand awareness |
| Measure:     | Action Plan Only     |

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

ACTION PLAN FOR IMPROVEMENT

Customer Communication Initiatives (interrelated):
• Launch 2nd customer feedback interviews Early Spring 2017
• Customer Facing technology Ongoing
  ➢ ARCHIBUS Notifications migration development, testing, and training nearing completion

Special Projects:
• Light Rail Coordination Committee (member of the communications working group)
• Academic Complex Communication Plan (implementation underway)
• 5-Year Plan External Communication Plan (implementation underway)
• 5-Year Plan website (in progress)
• FM Communication SOPs (targeted completion December 5)
• Traffic communications committee (joint partnership with University Communications):
  ➢ Request guidance from AVC
GOAL #4

Recruit, Develop, and Retain Quality Employees

Start with good people, lay out the rules, communicate with your employees, motivate them and reward them. If you do all those things effectively, you can't miss.

Lee Iacocca
GOAL #4  Recruit, Develop and Retain Quality Employees

Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

<table>
<thead>
<tr>
<th>Tactic 4.1.1:</th>
<th>Vacancy time of no longer than 80 calendar days – Nonexempt</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Vacancy time of no longer than 120 calendar days - Exempt</td>
</tr>
<tr>
<td>Tactic 4.1.2:</td>
<td>Reduce Number of Employees Terminated During Probationary Period to less than 5%</td>
</tr>
</tbody>
</table>

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

ON GOING AND CONTINUOUS – Through June 2016

Recruitment Strategies

- Increase the pool of qualified applicants and ensure a qualified, diverse applicant pool by expanding advertising venues when appropriate;
- Ensure timely and efficient processing of position management actions;
- Ensure that budgeted vacancies do not reach the abolishment threshold;
- Mandatory Targeted Selection for Supervisors;
- Updated Interview Guides.
Facilities Management Strategic Planning Session – First Quarter 2017

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

FM New Hire/ Promotions 1st Quarter FY 2017

New Hires = 14
Promotions = 8
Transfers = 3

FM New Hires / Promotions per Department 1st Quarter FY 2017

Nonexempt

Exempt

Nonexempt

Exempt
Facilities Management Strategic Planning Session – First Quarter 2017

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 Nonexempt Vacancies - FY 2017

Target - 80 Calendar Days
Missed by – 53 Days

# of Nonexempt Hires/Prom/Trans Average Number of Days

Q1: 21
Q2: 0
Q3: 0
Q4: 0

Target: 80 Calendar Days
Missed by: 53 Days
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) Vacancies - FY 2017

Target – 120 Calendar days
Missed by – 105 days
Facilities Management Strategic Planning Session – First Quarter 2017
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

ONGOING AND CONTINUOUS – Through June 2016

1)  Maintain updated position descriptions
2)  Work Plans
3)  Probationary Period
4)  Employee Evaluations
5)  Employee relations documentation - 3 causes for disciplinary action

   a)  Unsatisfactory job performance - problems with quantity/quality of performance; not following procedure; timeliness; accuracy & absenteeism

   b)  Unacceptable personal conduct - behavior, attitude (falsifying job application, theft, alcohol, refusing to accept assignment, betraying confidential info)

   c)  Grossly inefficient performance - destroying state property, causing harm or loss of life, etc.
Facilities Management Strategic Planning Session - First Quarter 2017

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 Separated before end of probationary period.

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

Separations by Department During Probation Nonexempt FY 2017

Separations by Department During Probation Exempt (Salaried) FY 2017

Status
Facilities Management Strategic Planning Session – First Quarter 2017

GOAL #4 Recruit, Develop and Retain Quality Employees

<table>
<thead>
<tr>
<th>Objective 4.1:</th>
<th>Recruit a Qualified Workforce in a Timely Fashion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tactic 4.1.2:</td>
<td>Reduce Number of Employees Terminated During Probationary Period to less than 5%</td>
</tr>
<tr>
<td>Measure:</td>
<td>Percent Employees Terminated before end of probationary period</td>
</tr>
</tbody>
</table>

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

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### Separations FY 2017 - Nonexempt

<table>
<thead>
<tr>
<th>Department</th>
<th>Qtr 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>BES</td>
<td>3</td>
</tr>
<tr>
<td>Facilities Operations</td>
<td>1</td>
</tr>
<tr>
<td>Grounds</td>
<td>1</td>
</tr>
<tr>
<td>Lock Shop</td>
<td>1</td>
</tr>
<tr>
<td>Recycling</td>
<td>1</td>
</tr>
</tbody>
</table>

**Turnover Rate:**  
FY 2017 = 0.04%

- Resignations = 5  
- Retirements = 1  
- Terminations = 3  
- Medical Reasons = 1

---

Legend:  
- Resignation  
- Retirement  
- Termination  
- Death  
- Medical
Facilities Management Strategic Planning Session – First Quarter 2017

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

Separations FY 2017 - Exempt

* No Exempt Separations for the 1st Quarter, FY 2017
GOAL #4  Recruit, Develop and Retain Quality Employees

Objective 4.2: Improve Workforce Development

<table>
<thead>
<tr>
<th>Tactic 4.2.1:</th>
<th>Increase Supervisor/Manager Training to 40 hours/year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tactic 4.2.2:</td>
<td>Increase Employee Training to 20 hours/year</td>
</tr>
</tbody>
</table>

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

ACTION PLAN FOR IMPROVEMENT

FM ACADEMY

Action: Increase training opportunities available to FM Employees

Technical
– Electrical Trouble Shooting & Preventive Maintenance
  March 2016
– Pump Repair & Maintenance
  May 2016

Safety
– Supervisor Safety Talks
  Monthly
– Winter Preparedness Expo (Dec 2015)
  Completed

Leadership
– APPA Leadership Academy – Level II
  Feb 2016
– APPA Leadership Academy – Level III
  March 2016
– APPA Supervisor Toolkit
  June 2016
– NEO redesign
  June 2016
– Cultural IQ Training
  TBD

Externally Driven Initiatives
– Niner Talent “Workplan” training
  Jan 2016
– Kronos training
  As needed
Facilities Management Strategic Planning Session – First Quarter 2017

GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.2: Improve Workforce Development

<table>
<thead>
<tr>
<th>Tactic 4.2.1:</th>
<th>Increase Supervisor/Manager Training to 40 hours/year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tactic 4.2.2:</td>
<td>Increase Employee Training to 20 hours/year</td>
</tr>
</tbody>
</table>

**Lead:** Facilities Business Office

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

---

**Departmental Development**

- Attend staff meetings with FO and BES to support L&D needs.
- Identify and source vendors for training delivery;
  - Areas of focus: Leadership, Technical, Administrative, Safety & Professional Development
- Communicate upcoming training events to FM employees;
- Review objective metrics with AVC for next FY;
- Coordinate and collaborate with other FM Learning and Development specialists;
- Research apprenticeship program feasibility for FM.

**NEO Review and Revamp**

- New FM NEO format developed to include presentations by Unit Directors and/or designee.
  - AVC approved, started July FY 17
  - Directors informed and presentation guidelines provided
Facilities Management Strategic Planning Session – First Quarter 2017

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 17

Training Hours for Supervisors & Managers by Quarter

FY 2017
Target - 1,960 hrs
1st Qtr. Target – 490 hrs

Actual YTD
400 hrs (20.4 %)

Actual 1st Qtr.
400 hrs (82 %)
Facilities Management Strategic Planning Session – First Quarter 2017

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 17**

*Training Hours for front line employees by Quarter*

- **Training Hours by QTR**
- **YTD Training Hours**

**FY 2017**

Annual Target - 7,760 hrs
1st Qtr. Target – 1,940 hrs

- **Actual YTD**
  - 763 hrs (10 %)
- **Actual 1st Qtr.**
  - 763 hrs (39.3 %)

**STATUS**
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

**ACTION PLAN FOR IMPROVEMENT**

**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.);
  - Contract signed October 2016
  - Focus Group development and assignment to begin November 2016
  - Revise, add or update questions based upon Focus Group feedback; Secure approval of changes from AVC-FM
- Determine scheduling timeframes – December 2016;
- Coordinate with L&D specialists within the larger units of FO and BES to ensure maximum participation;
Facilities Management Strategic Planning Session – First Quarter 2017

GOAL #4  Recruit, Develop and Retain Quality Employees

Objective 4.4: Improve Employee Safety

<table>
<thead>
<tr>
<th>Tactic 4.4.1:</th>
<th>Reduce the number of reportable accidents by 20%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tactic 4.4.2:</td>
<td>98% of Mandatory Compliance Training completed annually</td>
</tr>
</tbody>
</table>

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

ACTION PLAN FOR IMPROVEMENT

Efforts to reduce accidents:
Safety Training Provided FY17 YTD – 418 hours

- **Safety Training Taskforce** (Collaborative initiative with EHS)
  - Work progressing in development of training matrix topics/schedules to include: what, when, who and how strategies between FM and EHS;
  - Discussion held on best way to report training;
    - Need for access to current campus Learning Management System (LMS) by both FM and EHS;
    - Recommended course of action is to have this championed by AVC-FM and AVC-RMS at Senior Staff Level;
- Ladder Safety Training - Aug 2016
- Initiate Safety related activities
  - FM Safety Committee meeting  - Bi-monthly
  - Supervisor Safety Talks *(12-month topics posted to website; coordinating topic selection with EHS)*
  - Safety Slogan Contest - *“Safety Pays In Many Ways”*
- Current Stats for Accident/Incident Totals *(CY16)*
  - Accidents - 11
  - Minor incidents – 0
Facilities Management Strategic Planning Session – First Quarter 2017

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

<table>
<thead>
<tr>
<th>Year</th>
<th>Accidents</th>
<th>First Aid Only</th>
</tr>
</thead>
<tbody>
<tr>
<td>2007</td>
<td>28</td>
<td>4</td>
</tr>
<tr>
<td>2008</td>
<td>26</td>
<td>2</td>
</tr>
<tr>
<td>2009</td>
<td>24</td>
<td>0</td>
</tr>
<tr>
<td>2010</td>
<td>17</td>
<td>1</td>
</tr>
<tr>
<td>2011</td>
<td>24</td>
<td>5</td>
</tr>
<tr>
<td>2012</td>
<td>19</td>
<td>7</td>
</tr>
<tr>
<td>2013</td>
<td>11</td>
<td>1</td>
</tr>
<tr>
<td>2014</td>
<td>12</td>
<td>2</td>
</tr>
<tr>
<td>2015</td>
<td>21</td>
<td>6</td>
</tr>
<tr>
<td>2016</td>
<td>11</td>
<td>0</td>
</tr>
</tbody>
</table>

FM Accident Trends

CY 2016 Continuous Improvement Target ≤ 17

STATUS
Facilities Management Strategic Planning Session – First Quarter 2017

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

<table>
<thead>
<tr>
<th>Action Item</th>
<th>Target Date</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>FM Academy</strong></td>
<td></td>
</tr>
<tr>
<td>• Web Content Development, working with FM Communications Officer</td>
<td>Ongoing</td>
</tr>
<tr>
<td>– Online training evaluation form posted to FM website</td>
<td></td>
</tr>
<tr>
<td>– Supervisor Safety Talk (SST) topics 2016 calendar published</td>
<td></td>
</tr>
<tr>
<td>– Commonly used FM Acronyms listing (published Feb 2016)</td>
<td></td>
</tr>
<tr>
<td>– Training vendor sourcing &amp; selection (as needed/as funded)</td>
<td></td>
</tr>
<tr>
<td>– Updates to website on upcoming L &amp; D events</td>
<td></td>
</tr>
<tr>
<td><strong>Leadership</strong></td>
<td></td>
</tr>
<tr>
<td>• APPA leadership workshops.</td>
<td></td>
</tr>
<tr>
<td>– APPA Leadership Academy (Level III) (Completed)</td>
<td>Sept 2016</td>
</tr>
<tr>
<td>– APPA Supervisor Toolkit</td>
<td>Spring 2017</td>
</tr>
<tr>
<td>– APPA Leadership Academy (Level IV) (Four employees)</td>
<td>Jan 2017</td>
</tr>
<tr>
<td>– Updates to FM Leadership Development Matrix</td>
<td>In Process</td>
</tr>
<tr>
<td><strong>Technical</strong></td>
<td></td>
</tr>
<tr>
<td>– Ladder Safety Training</td>
<td>Sept 2016</td>
</tr>
<tr>
<td>– Apprenticeship Project (Business case preparation)</td>
<td>In Process</td>
</tr>
</tbody>
</table>
GOAL #5

Promote Good Stewardship

Transparency, honesty, kindness, good stewardship, even humor, work in businesses at all times.

John Gerzema
Facilities Management Strategic Planning Session – Fourth Quarter 2016

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 FOR IMPROVEMENT

Finance/Budget:

- FY 17 Call for Central and recurring funding completed on time;
- FY 17 One-Time VCBA budget call completed; anticipate allocations in November 2016.
- **NEW**: Management Process for projects managed by FO – Growing area of concern regarding budget management and tracking of expenses for larger dollar (capitalized – over $5K) projects done by FO. Trial process underway using current central fund projects with FO as lead.
- **NEW**: Meetings with FO front-line supervisors initiated September 2016; Request for meetings to recur quarterly except 4th qtr.
- Annual Budget Process – draft underway; New component will be a three year look ahead for personnel. Anticipate distribution in January 2017 with review and approval by AVC-FM.
- Strategic Personnel discussion with FM leadership anticipated to begin in October 2016.

Supplemental Grant/Award Funding:

- 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 2017;
- Encourage use of APPA grant and award program to supplement funding within FM;
  - BES winner of new award/grant for FY 17
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 FOR IMPROVEMENT

Cost Accounting – Ongoing and Continuous Improvements

- Continuously work on strategy to improve cost accounting measures within all areas of Facilities Management; Need for an entry-level accountant position to improve and monitor use of account codes, cost centers, etc. across FM; Position will assist in the areas of reporting; monitoring and management; Key component for FBO organizational structure and succession planning, as well;
- **Improve org code usage** – July 2016 through June 2017;
- Review monthly position control reports to ensure that positions/budgets are appropriately aligned. – 15th of each month; Positions with insufficient budget have become a growing concern – recommend using annual budget process as possible means to address this strategic issue.
GOAL #5  Promote Good Stewardship

Objective 5.1: Promote Fiscal Responsibility

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

Lead: Facilities Business Office
Balanced Scorecard Category: Financial Perspective

ACTION PLAN FOR IMPROVEMENT

FY 16 APPA Survey:
• Cost Data collection for FY 16 survey: Underway;
• Beta version available: February 2017 - tentative;
• Actual results available: March - April 2017 - tentative;
• Presentation of comparative findings for UNC Charlotte Administrative cost/ GSF: April 2017

FY 16 NACUBO Key Facilities Metrics Survey:
• Data collection for FY 16 survey completed and submitted on time;
• Actual results available: March 2017 - tentative;
• Review of data and next step determination is outstanding; AVC guidance needed.

Administrative Cost/GSF Analysis:
• Cost per GSF for administration – higher than peer institutions.
  • Possible reasons – growth of FM staffing in this area to include Real Estate and Space positions
  • Anticipate same trend as support area needs (I.e., FBO, FIS, etc.) continue to manifest.
Facilities Management Strategic Planning Session – Second Quarter FY 2017

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

FY 2016 Budget Report:
Percentage of YTD Expenditures

<table>
<thead>
<tr>
<th>Fund</th>
<th>Percentage of YTD Expenditures</th>
</tr>
</thead>
<tbody>
<tr>
<td>Base Operations</td>
<td>97.3</td>
</tr>
<tr>
<td>BA-OT</td>
<td>99.8</td>
</tr>
<tr>
<td>Emergency Fund</td>
<td>98.7</td>
</tr>
</tbody>
</table>
Facilities Management Strategic Planning Session – Fourth Quarter 2016

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

Overall APPA Avg. = $0.53
SRAPPA Avg = $0.38
Target = $0.404 (-5%)
UNC Charlotte = $0.67
GOAL #6 – Promote Good Stewardship

Objective: 5.1: Promote Fiscal Responsibility
Tactic 5.1.4: Achieve Custodial Costs/Student FTE Plus or Minus 5% of the APPA Average for Peer Institutions
   (Internal UNC Peers = East Carolina)
   (National Peers – Portland State University, University of New Mexico, University of Texas at San Antonio)

ACTION PLAN

• Actions Completed
  – Installed washers & dryers in COED and Kennedy laundry rooms and prepare for use (9/2016)

• Actions Planned
  – Implement internal labor resource model to include temporary, disabled, student, and vocational workers (2/2017)
  – Development of BES&R 5-year plan (2/2017)
  – Implement team cleaning model throughout all BES zones (ongoing)
  – Monitor and report custodial cost/student FTE on an annual basis using data from APPA survey (ongoing)
  – Develop a BES strategic dashboard that tracks cost, quality, and process data points over time (ongoing)
Facilities Management Strategic Planning Session – Third Quarter FY 2016

GOAL #5 – Promote Good Stewardship

Objective: 5.1: Promote Fiscal Responsibility

Tactic 5.1.4: Achieve Custodial Costs/Student between Plus or Minus 5% of the APPA Average for Peer Institutions (Internal UNC Peers = East Carolina) (National Peers – Portland State University, University of New Mexico, University of Texas at San Antonio)

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

Balanced Scorecard Category: Financial Perspective
Facilities Management Strategic Planning Session – First Quarter FY 2017

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

- 1st Qtr FY17: $661,573 (22% of Goal Met)
- 2nd Qtr FY17: $2,298,427

22% of Goal Met

$2.96M Actual Annual Goal

Goal Not Met
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
  • Survived Move-In: Filled 7 roll-offs with cardboard (11,000 pounds) plus filled a 48’ trailer with block Styrofoam (2,000 pounds). Great partnership with HRL!
  • Prepared for Football and completed first two games (approx. 1.5 tons recycled/composted; about .5 tons for trash; still waiting on final weight tickets).
  • Universal Waste Facility is now fully operational (collections areas for paint, automotive batteries, fluorescent lamps, refrigerant tanks, electronics, and a satellite hazardous waste area). Big thanks to Grounds for helping us move/load pallets of materials!
  • With BES, developed a plan for all the moves that will take place with the 5-Year Capital Plan.
  • Updated signage in all residence halls and academic/administrative buildings.

2nd Quarter Actions Planned
• Complete Zero-Waste football season (2 games in October; 2 games in November)
• First pickup of fluorescent lamps from Universal Waste Facility (October 24)
• Fall campus cleanup/tree banding (October 4)
• Implement BES&R plan for 5-Year Capital Plan for Denny complex (currently in process; Denny move in December)
• Upgrade and fill vacant Recycling Tech position (position closed; interviews take place November 1-3)
Facilities Management Strategic Planning Session – Fourth Quarter FY 2016

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
4th Quarter FY16

<table>
<thead>
<tr>
<th>Year</th>
<th>Tons Landfilled</th>
<th>Tons Recycled</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY 13</td>
<td></td>
<td>60.4%</td>
</tr>
<tr>
<td>FY 14</td>
<td></td>
<td>60.4%</td>
</tr>
<tr>
<td>FY 15</td>
<td></td>
<td>73.5%</td>
</tr>
<tr>
<td>FY 16 (YTD)</td>
<td></td>
<td>30.9%</td>
</tr>
<tr>
<td>Total Qtr</td>
<td></td>
<td>35.1%</td>
</tr>
</tbody>
</table>

STATUS: 4th Qtr
Tactic 5.2.2
Increase Percent of Solid Waste Diversion on Campus to 45% by 2020
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>Quarter</th>
<th>Diverted Waste</th>
<th>Total Waste</th>
</tr>
</thead>
<tbody>
<tr>
<td>Baseline 4th Qtr FY08</td>
<td>695 tons</td>
<td>28%</td>
</tr>
<tr>
<td>2nd Qtr FY16</td>
<td>877 tons</td>
<td>34%</td>
</tr>
<tr>
<td>3rd Qtr FY16</td>
<td>820 tons</td>
<td>37%</td>
</tr>
<tr>
<td>4th Qtr FY16</td>
<td>401 tons</td>
<td>46%</td>
</tr>
<tr>
<td>1st Qtr FY17</td>
<td>349 tons</td>
<td>45%</td>
</tr>
</tbody>
</table>

### Annual Solid Waste Comparison

![Graph showing annual solid waste comparison from 2008 to 2017](attachment:image_graph.png)

- **Total waste Diverted**
- **Total Solid Waste**
Facilities Management Strategic Planning Session – First Quarter FY 2017

GOAL #5 – Promote Good Stewardship

Objective: 5.2: Develop a Sustainable Campus
Tactic 5.2.3: Achieve silver rating on the Sustainability Tracking and Reporting System (STARS) NLT end of FY 17.
Measure: STARS points to achieve silver rating

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

ACTION PLAN

- Achieved STARS 2.0 Rating of Silver in October
- Breakdown of Credits (earned/available):
  - Academics (29.65/41 = 72%)
  - Operations (24.09/69 = 35%)
  - Planning & Administration (19.64/32 = 61%)
  - Engagement (24.01/41 = 59%)
- Determine feasibility of achieving next level (STARS 2.1 Gold) in less than 2 years (current rating expires, STARS 3.0 revision will move the goalposts)
Facilities Management Strategic Planning Session – First Quarter FY 2017

GOAL #5 – Promote Good Stewardship

Objective: 5.2: Develop a Sustainable Campus
Tactic 5.2.3: Achieve silver rating on the Sustainability Tracking and Reporting System (STARS) NLT end of FY 17.
Measure: STARS points to achieve silver rating

Lead: Facilities Planning
Balanced Scorecard Category: Innovation and Learning Perspective
Facilities Management Strategic Planning Session – First Quarter FY 2017

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 17.
Measure: Percent of Campus Sustainability Plan best practices implemented

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

ACTION PLAN

- Apply 7 themes for implementing best practices:
  1. Assessment (STARS Completed; retained Princeton Review Green Guide standing)
  2. Faculty Development for Curriculum (2017 Workshop for Faculty)
  3. Campus as a Laboratory (CGI: $21k for studies underway, EPA Rainworks)
  4. Outreach Communications (Website development, Campus Sustainability Week)
  5. Design Standards (Green Building Review; CGI projects; CFAT Vehicle Charging)
  6. Standard Operating Procedures
  7. Purchasing Practices

- 63% of Sustainability Plan goals have best practices implemented (goal 60%)
- Rewrite Sustainability Plan by end of 2017

STATUS
Facilities Management Strategic Planning Session – First Quarter FY 2017

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 17.
Measure: Percent of Campus Sustainability Plan best practices implemented

Lead: Facilities Planning
Balanced Scorecard Category: Innovation and Learning Perspective
GOAL #5 – Promote Good Stewardship

Objective 5.3  Conserve Natural Resources
Tactics 5.3.1 Decrease Energy Usage 40% by FY2025

- Retro-commissioning program
  - Cameron, McEniry, & Smith completed
  - Grigg & Woodward Contracts are being processed
- Exterior Lighting upgrades to LED
  - Replacing building mounted HID’s
  - Pedestrian Lights to be replaced as funds become available – start with campus core.
- New Goal of 40% reduction by 2025
GOAL #5 – Promote Good Stewardship

Objective  5.3  Conserve Natural Resources
Tactics  5.3.1  Decrease Energy Usage 40% by FY2025

Retro Commissioning Results

• McEniry
  • RCx costs $65,000 ($0.57/GSF)
  • Repairs $19,000
  • Electric Payback 30 months

• Smith
  • RCx costs $42,000 ($0.45/GSF)
  • Repairs $37,000
  • Electric Payback 9 years

• Cameron
  • RCx Costs $98,000 ($0.67/GSF)
  • Repairs $137,000
  • Electric Payback 15 years
Facilities Management Strategic Planning Session – 1st QTR FY 2017

GOAL #5 – Promote Good Stewardship

Objective 5.3 Conserve Natural Resources
Tactics 5.3.1 Decrease Energy Usage by 40% by FY2025

Measure: BTUs/GSF/Year consumed on campus

Balanced Scorecard Category: Financial Perspective

CAMPUS ENERGY USAGE
Kbtu/GSF

Base Year FY 2003
Current Reduction 33%
System Goal of 40% by 2025
GOAL #5 – Promote Good Stewardship - First Quarter FY2017

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

Continue . . .

- Establish project specific participation goals for single prime projects
- Challenge GCs to obtain 25% or better participation on CMAR projects
- Review GFE documentation for compliance
- Work with internal/external groups to identify skilled HUB contractors
- Work with GA/SCO to ensure HUB information accurately reflected in InterscopePlus
Facilities Management Strategic Planning Session – First Quarter FY2017

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

No Projects To Report
Facilities Management Strategic Planning Session – First Quarter FY2017

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

No Projects To Report
Facilities Management Strategic Planning Session – First Quarter FY2017

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

- Total Informal Project Dollars
- Informal Project Dollars w/HUB Firms

FY 2014: 39%
FY 2015: 52%
FY 2016: 64%
1st Qtr 2017: 92%
Facilities Management Strategic Planning Session – First Quarter FY 2017

GOAL #5 – Promote Good Stewardship

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

Lead: Design Services

Balanced Scorecard Category: Internal Business Process

<table>
<thead>
<tr>
<th>Tactic 5.4.4:</th>
<th>13% overall HUB participation on informal projects below $30,000 including 3% African American</th>
</tr>
</thead>
<tbody>
<tr>
<td>Measure:</td>
<td>Total Percentage of HUB participation on all Informal Projects below $30,000 (Construction only) divided by Total Contracts</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Tactic 5.4.5:</th>
<th>3% African American participation on Informal projects below $30,000</th>
</tr>
</thead>
<tbody>
<tr>
<td>Measure:</td>
<td>Total African American contract dollars (Construction only) divided by Total Contract Dollars</td>
</tr>
</tbody>
</table>

ACTION PLANS FOR IMPROVEMENT

NEW IMPROVEMENTS

Ashley Sisco with Design Services is assisting Amanda Caudle with outreach for more African American contractors and verification of HUB contractor involvement.

ONGOING IMPROVEMENTS

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

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 and Ashley Sisco act as advisors to other Design Services Project Coordinators.
Facilities Management Strategic Planning Session – First Quarter FY 2017

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

<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>FY09</td>
<td>$996,756</td>
<td>$89,479</td>
<td>9.0%</td>
</tr>
<tr>
<td>FY10</td>
<td>$1,452,202</td>
<td>$88,703</td>
<td>6.1%</td>
</tr>
<tr>
<td>FY11</td>
<td>$3,924,102</td>
<td>$857,125</td>
<td>21.8%</td>
</tr>
<tr>
<td>FY12</td>
<td>$2,878,027</td>
<td>$891,793</td>
<td>31.0%</td>
</tr>
<tr>
<td>FY13</td>
<td>$2,891,003</td>
<td>$902,065</td>
<td>31.2%</td>
</tr>
<tr>
<td>FY14</td>
<td>$1,863,533</td>
<td>$700,603</td>
<td>37.6%</td>
</tr>
<tr>
<td>FY15</td>
<td>$2,655,882</td>
<td>$1,150,394</td>
<td>43.3%</td>
</tr>
<tr>
<td>FY16</td>
<td>$2,605,540</td>
<td>$1,252,152</td>
<td>48.1%</td>
</tr>
</tbody>
</table>

| Q 1              | $450,049                    | $177,283           | 39.4%     |
| Q 2              | $-                           | $-                 | 0.0%      |
| Q 3              | $-                           | $-                 | 0.0%      |
| Q 4              | $-                           | $-                 | 0.0%      |

FY '16 STATUS     | $450,049                    | $177,283           | 39.4%     |

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

13% Overall HUB Participation – Summary Graph

<table>
<thead>
<tr>
<th>FY09</th>
<th>FY10</th>
<th>FY11</th>
<th>FY12</th>
<th>FY13</th>
<th>FY14</th>
<th>FY15</th>
<th>FY16</th>
<th>Q 1</th>
<th>Q 2</th>
<th>Q 3</th>
<th>Q 4</th>
<th>FY '16 STATUS</th>
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<tr>
<td>9.0%</td>
<td>6.1%</td>
<td>21.8%</td>
<td>31.0%</td>
<td>31.2%</td>
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<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>39.4%</td>
</tr>
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Annual Goal 13%

QTR 1 Status 39.4%

Lead Design Services

FY '16 STATUS 39.4%
Facilities Management Strategic Planning Session – First Quarter FY 2017

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>
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<tr>
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<tbody>
<tr>
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<td>$2,891,003</td>
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<td>$103,513</td>
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<td>FY16</td>
<td>$2,605,540</td>
<td>$47,345</td>
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<td>$0</td>
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3% African American Participation – Summary Graph