Strategic Planning Session

Second Quarter – Fiscal Year 2014
October – December 2013

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

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

-- Harold Geneen, industrialist
Facilities Management Strategic Planning Session – Second Quarter FY 2014

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 – Continue to stress accurate reporting and recording of employee’s time.
     a) Meet with shop supervisor and PA’s to review.
     b) Stress importance with all employees.
     c) Get supervisors out “in the field”
     d) Review white sheets in detail.
  2 – Get employees out of the shop.
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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%
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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 add items that have been ordered repeatedly as non-stock items to stock as order-on-request items (carried at an inventory level of “zero” but pre-sourced for faster ordering and delivery).
2 – Specifically track long lead items and spikes in usage (historically the main causes for inability to fill).
3 – Continue to monitor and reduce Requisition to PO processing time.
4 – Continue to send out daily reminders for approvals.
5 – Continue to push SDI Punch-out.
Facilities Management Strategic Planning Session – Second Quarter FY 2014

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

![Graph showing the status of non-stock on-time delivery from 1st Qtr FY14 to 4th Qtr FY14. The goal is to reach 95% on-time delivery. The graph shows:
- 1st Qtr FY14: 97.00%
- 2nd Qtr FY14: 93.00%
- 3rd Qtr FY14: 93.00%
- 4th Qtr FY14: 93.00%
]
Facilities Management Strategic Planning Session – Second Quarter FY 2014

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>Quarter</th>
<th>Status</th>
<th>Goal 3.5 days</th>
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<tbody>
<tr>
<td>1st Qtr FY14</td>
<td>3.88</td>
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<td>3.50</td>
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<td>4th Qtr FY14</td>
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<td>3.50</td>
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</table>
Facilities Management Strategic Planning Session – Second Quarter FY 2014

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 – Continue to build PM Program to cover all equipment and buildings.
3 – Continue increasing predictive maintenance measures as funds permit.
4 – Continue review of reactive work requests for routine services that should be moved to “scheduled services,” or PM.
5 – Emphasize Facilities Operations OP-16 Timely and Accurate Handling/Processing of WRs.
6 – UPA and Managers to monitor 14 day report; weekly meeting to review.
Facilities Management Strategic Planning Session – Second Quarter FY 2014

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

Goal < 15%

825
786
0 0
0
100
200
300
400
500
600
700
800
900
1st Qtr FY14 2nd Qtr FY14 3rd Qtr FY14 4th Qtr FY14

(701)
Facilities Management Strategic Planning Session – Second Quarter FY 2014

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 - Decrease by 10%

(52.61 Hours)
GOAL #1 – Continuously Improve Maintenance and Operations

Objective: 1.1: Improve BES Processes
Tactic 1.1.1: Achieve APPA Level 2 in 98% of Buildings

ACTION PLAN

• Actions Completed
  – Solomon Franklin attended Janitor University, “ManageMen” in Salt Lake City, Utah from October 7 – 11, 2013
  – BES Re-Org Study underway
  – All buildings not in renovation audited (self audit)
  – Changed chart to reflect summary data for last four quarters
  – Investigated CIMS/OS1 Certification (feasibility review)
  – Recommended outside audit of BES cleaning processes using OS1 and APPA Cleanliness Levels

• Actions Planned
  – Proceed with outside audit of BES cleaning processes using OS1 and APPA Cleanliness Levels
  – Tabling event at each building for BES reorganization, supervisors, managers, and BES office staff to meet all Building Liaisons by 12/31/14
  – Continue quarterly self audits
  – Survey In-state peers on Organizational Structure and shift schedule
  – Conference call with In-state peers
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GOAL #1 – Continuously Improve Operation of Campus Facilities

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)

Balanced Scorecard Category: Customer Perspective

APPA LEVELS

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Percentage</th>
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<tr>
<td>FY13-3rd QTR</td>
<td>94%</td>
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<td>FY13-4th QTR</td>
<td>95%</td>
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<tr>
<td>FY14-1st QTR</td>
<td>74%</td>
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<tr>
<td>FY14-2nd QTR</td>
<td>91%</td>
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</tbody>
</table>

Percentage = 91%
Facilities Management Strategic Planning Session – Second Quarter FY 2014

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 – Continue to inventory and update equipment lists.
2 – Complete conversion from old PM Module to new PM Module. UPA and Managers to monitor status.
2 – Closer monitoring of PM completions by Supervisors and Managers.
3 – Continue expansion of PM Program and predictive maintenance program. Work with key customers.
4 – Prepare program for major equipment repairs and replacement.
5 – Review system projects identified on the R&R list and prioritize. Indicate urgency and recommend future funding dates.
6 – Continue to monitor equipment; swiftly and accurately report outages.
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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 (Completed divided by Total Completed + Cancelled + Rejected)

Lead: Facilities Operations
Balance Scorecard Category: Internal Business Process

![Graph showing the improvement of PM Work Orders completion over quarters]

- **Goal to 90%**
- **1st Qtr FY14: 94.8%**
- **2nd Qtr FY14: 87.5%**
- **3rd Qtr FY14: 0.0%**
- **4th Qtr FY14: 0.0%**

STATUS
Facilities Management Strategic Planning Session – Second Quarter FY 2014

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
Facilities Management Strategic Planning Session – Second Quarter FY 2014

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, Roads measured separately)

Lead: Facilities Operations
Balance Scorecard Category: Customer Perspective

Unscheduled Utility Outages

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Outages</th>
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<tr>
<td>1st Qtr FY14</td>
<td>7</td>
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<tr>
<td>2nd Qtr FY14</td>
<td>5</td>
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<tr>
<td>3rd Qtr FY14</td>
<td>0</td>
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<tr>
<td>4th Qtr FY14</td>
<td>0</td>
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</table>

Goal: Fewer than 5 outages
Facilities Management Strategic Planning Session – Second Quarter FY 2014

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

![Graph showing the ratio of Preventive/Predictive Work Requests for Q1 to Q4 FY14]

**Goal to improve ratio to 50%**

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Ratio (%)</th>
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<tbody>
<tr>
<td>1st Qtr FY14</td>
<td>32.82</td>
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<td>2nd Qtr FY14</td>
<td>27.66</td>
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<tr>
<td>3rd Qtr FY14</td>
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<td>4th Qtr FY14</td>
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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 – FY14

1. ARCHIBUS Upgrade – **User Views/Reports Fixes In Process**
2. Space GA Reports – **In Process**
3. Space Data Clean Up – **Not Started**
4. Design & FBO Enhancements – **In Process**
5. FM Surveys – **Not Started**
7. Real Estate Module – **In Process**
8. Facilities Condition Assessment Program (FCAP) – **In Process**
9. CRDM Enhancements – **In Process**
10. FBO Accounting Upgrades – **Not Started**
11. LockShop Enterprise Data Assistant (EDA) – **In Process**
12. BES Enterprise Data Assistant (EDA) Asset Management - **On Hold; Project will resume in February**
13. BAS LDAP Upgrade & Security Enhancements – **Funding/POs Generated**
14. ARCHIBUS Key Management – **Not Started**
15. WO Hot Work Permit Form/Utility – **Not Started**
16. Campus Map Portal – **Not Started**
## FY 14 Project Schedule

<table>
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<tr>
<th>Task Name</th>
<th>Duration</th>
<th>Start</th>
<th>Finish</th>
<th>By 2</th>
<th>August 3</th>
<th>September 1</th>
<th>October 1</th>
<th>November 1</th>
<th>December 1</th>
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<th>May 1</th>
<th>June 1</th>
<th>July 1</th>
<th>August 1</th>
<th>September 1</th>
<th>October 1</th>
<th>November 1</th>
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<tr>
<td>Archibus 21 Upgrade</td>
<td>32 days</td>
<td>Thu 8/1/13</td>
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<td>Space GA Report</td>
<td>23 wks</td>
<td>Mon 1/16/14</td>
<td>Fri 2/21/14</td>
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<td>Space GA Data Cleanup</td>
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<td>Design FBO Enhancements</td>
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<td>Sun 12/8/13</td>
<td>Fri 1/10/14</td>
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<td>FM Surveys</td>
<td>4 wks</td>
<td>Sun 2/23/14</td>
<td>Thu 3/20/14</td>
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<td>CRDM Enhancements</td>
<td>11.2 wks</td>
<td>Sun 3/15/13</td>
<td>Fri 11/29/13</td>
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<td>Lockshop EDA Deployment</td>
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<tr>
<td>BAS LDAP Upgrade &amp; Security Enhancements</td>
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<td>Custom WO Hot Work Form/Utility</td>
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<td>SDI Fix Transactions</td>
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<td>Real Estate Module</td>
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<td>Sun 4/6/14</td>
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<td>Campus Map Portal</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:

1. Recruit and Hire GIS Developer position by March 2014, which will bring FIS staffing to 100%.
2. Finalize BAS upgrade/LDAP projects by June 6, 2014.
3. Launch FCAP module for FO testing & use by 28Feb2014.
4. Complete 100% of Testing for Lockshop EDA project by 28Feb2014.
5. First set of ARCHIBUS Training videos and new documentation to be available via Moodle April 1st.
Facilities Management Strategic Planning Session – Second Quarter FY 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

Measure: Percent Completion of Five-Year Technology Projects
Based upon Cumulative Average of Project Completion

Balanced Scorecard Category: Internal Business Processes

Cumulative Average: Project Task Completion
Baseline Metric
Facilities Management Strategic Planning Session – Second Quarter FY 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

Measure: Percent Completion of Five-Year Technology Projects

Project Status Completion Percentage

Balanced Scorecard Category: Internal Business Processes

FY 14 / 2nd Qtr Status:
Projects at 100%
Completion: 2 of 16
Facilities Management Strategic Planning Session – Second Quarter FY 2014

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>Increase Project Capacity by 10 projects per year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Measure:</td>
<td>Number of Projects Completed (Annual Goal) - Currently: HIDDEN</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 – Including all Timeline and Audit documents.
    - **Timeline:** FY14 QTR 3 - FY15 QTR 2
  - Convert current Excel Purchase Requisition (PR) to ARCHIBUS PR, and Convert current Excel Timeline to MS Project style chart.
    - **Timeline:** FY15 QTR 1 - FY15 QTR 4
  - Link Project Folders to ARCHIBUS for document reviews and access.
    - **Timeline:** FY15 QTR 1 - FY15 QTR 4

- **Customer Orientation for Design Services Processes and ARCHIBUS Design Services Project Management:**
  - Customer meet and greet to help our Customers understand our processes – Project entry, approvals, timelines, SCO, etc.
    - **Timeline:** FY15 QTR 1 - FY15 QTR 4
  - Project Priority List to include new column designating “true” Customer.
    - **Timeline:** FY15 QTR 1 - FY15 QTR 4

- **Panel Board Worksheets:**
  - Implement master worksheets for electrical panels across campus as projects develop showing current and future panel loads and develop database allowing better decisions for future projects and maintenance on campus.

- **Develop and Implement new Customer Survey by end of 2nd QTR – FY15**

Ongoing Improvements

- **Continue ongoing efforts to assign Classroom Capacity and provide egress information per building:**
Facilities Management Strategic Planning Session – Second Quarter FY 2014

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective: 2.2: Improve Informal Project Design and Construction Process

Balanced Scorecard Category: Internal Business Process

ACTION PLANS FOR IMPROVEMENT

Ongoing Improvements

• Implement process updates based on four committee recommendations identified during 1st Quarter FY-2013:
  1. Streamline Processes
  2. Under $30K Contracts (Complete)
  3. Develop new Customer Survey
  4. Increase African American HUB usage

• Continue ongoing efforts to assign Classroom Capacity and providing egress information per individual buildings:
  Driven by building and project needs.

IMPLEMENTED ACTIONS AND PLANS

• Establish proven steps to beneficial occupancy via Customer and departmental meetings. Ongoing.

• Customer involvement with project Punch List process. Ongoing
Facilities Management Strategic Planning Session – Second Quarter FY 2014

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective: 2.2: Improve Informal Project Design and Construction 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.)

Balanced Scorecard Category: Internal Business Process

<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>QTR 1</td>
<td>31</td>
<td>30</td>
<td>1</td>
<td>96.8%</td>
</tr>
<tr>
<td>QTR 2</td>
<td>45</td>
<td>42</td>
<td>3</td>
<td>93.3%</td>
</tr>
<tr>
<td>QTR 3</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.0%</td>
</tr>
<tr>
<td>QTR 4</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.0%</td>
</tr>
<tr>
<td>FY '14 STATUS</td>
<td>76</td>
<td>72</td>
<td>4</td>
<td>94.7%</td>
</tr>
</tbody>
</table>
Facilities Management Strategic Planning Session – Second Quarter FY 2014

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% NLT 06/15.

Measure: Average Building FCI for campus

Lead: Facilities Planning

Balanced Scorecard Category: Internal Business Process

ACTION PLAN

• Actions Planned:
  o Complete CRDM update including revision of SOP by May 2014.
  o Complete Phase 2, CRDM, for FCI capability (FIS) by October 2014.
  o Determine O/A Draft FCI of buildings by December 2014.
  o Recommend a plan/ prioritize projects to improve FCI by 5% by end of FY 2015 by March 2015.
Facilities Management Strategic Planning Session – Second Quarter FY 2014

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% NLT end of FY 15.

Measure: Average Building FCI for campus

Lead: Facilities Planning

Balanced Scorecard Category: Internal Business Process

<table>
<thead>
<tr>
<th>Percentage of Completion</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
</tr>
<tr>
<td>.9</td>
</tr>
<tr>
<td>.8</td>
</tr>
<tr>
<td>.7</td>
</tr>
<tr>
<td>.6</td>
</tr>
<tr>
<td>.5</td>
</tr>
<tr>
<td>.4</td>
</tr>
<tr>
<td>.3</td>
</tr>
<tr>
<td>.2</td>
</tr>
<tr>
<td>.1</td>
</tr>
<tr>
<td>0</td>
</tr>
</tbody>
</table>

Status:
- 1st Qtr FY 14: 20%
- 2nd Qtr FY 14: 20%
- 3rd Qtr FY 14: 20%
- 4th Qtr FY 14: 20%

Lead Facilities Planning

29
Facilities Management Strategic Planning Session – Second Quarter FY 2014

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 June 2015.

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 Complete space allocations/inventory by room category in ARCHIBUS.
    (Ongoing)
  o Compare inventory to standard and report % difference (Office inventory by June 2014; remainder by September 2014).
  o Recommend a plan/prioritize projects to improve allocations to within 5% of the standard by June 2015.
Facilities Management Strategic Planning Session – Second Quarter FY 2014

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 FY 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
Facilities Management Strategic Planning Session – Second Quarter FY 2014

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:**
  - Sustain current process of completing Operating Budget sheets for new projects (ongoing)
  - Support Capital, when required, with further study related to funding (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**

- 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 – Second Quarter FY 2014

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 within 120 days</th>
<th>Designer not under contract within 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>1st Qtr. FY-14</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>50%</td>
</tr>
<tr>
<td>2nd Qtr. FY-14</td>
<td>4</td>
<td>1</td>
<td>n/a</td>
<td>100%</td>
</tr>
</tbody>
</table>

Tactic Measurement for 2nd Quarter is 100%
Facilities Management Strategic Planning Session – Second Quarter FY 2014

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-13</td>
<td>3</td>
<td>1</td>
<td>75%</td>
</tr>
<tr>
<td>1st Qtr. FY-14</td>
<td>1</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>2nd Qtr. FY-14</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
</tbody>
</table>

Tactic Measurement for 2nd Quarter is N/A
Facilities Management Strategic Planning Session – Second Quarter FY 2014

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>Projects</th>
<th>OC25</th>
<th>Initial Contract</th>
<th>Final/Current Contract</th>
<th>Percent Difference Between OC25 &amp; Initial Contract</th>
<th>Percent Difference Between Initial &amp; Final Contract</th>
<th>Completed Within Design Budget (1=yes, 0=no)</th>
</tr>
</thead>
<tbody>
<tr>
<td>PORTAL</td>
<td>$2,466,950</td>
<td>$2,200,000</td>
<td>$2,290,200</td>
<td>-10.8%</td>
<td>4.1%</td>
<td>0</td>
</tr>
<tr>
<td>RDH Renovation</td>
<td>$1,742,048</td>
<td>$1,981,410</td>
<td>$1,987,410</td>
<td>13.7%</td>
<td>0.3%</td>
<td>0</td>
</tr>
<tr>
<td>Res. Hall Ph XII</td>
<td>$3,400,667</td>
<td>$2,733,245</td>
<td>$2,778,245</td>
<td>-19.6%</td>
<td>1.6%</td>
<td>0</td>
</tr>
<tr>
<td>Res. Hall Ph. XIII</td>
<td>$3,081,868</td>
<td>$2,188,800</td>
<td>$2,188,800</td>
<td>-29.0%</td>
<td>0.0%</td>
<td>1</td>
</tr>
<tr>
<td>Res. Hall Ph. XIV</td>
<td>$2,641,144</td>
<td>$0</td>
<td>$0</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0</td>
</tr>
<tr>
<td>RUP IV</td>
<td>$60,440</td>
<td>$385,000</td>
<td>$484,162</td>
<td>0.0%</td>
<td>25.8%</td>
<td>0</td>
</tr>
<tr>
<td>Modular Office Bldg</td>
<td>$591,176</td>
<td>$531,000</td>
<td>$531,000</td>
<td>0.0%</td>
<td>0.0%</td>
<td>1</td>
</tr>
<tr>
<td>Oak Hall Renovation</td>
<td>$908,068</td>
<td>$0</td>
<td>$0</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0</td>
</tr>
<tr>
<td>Elm, Pine &amp; Maple Reno.</td>
<td>$1,039,730</td>
<td>$1,165,000</td>
<td>$1,165,000</td>
<td>12.0%</td>
<td>0.0%</td>
<td>1</td>
</tr>
<tr>
<td>Holshouser Hall Reno.</td>
<td>$3,081,868</td>
<td>$2,188,800</td>
<td>$2,188,800</td>
<td>-29.0%</td>
<td>0.0%</td>
<td>1</td>
</tr>
<tr>
<td>Sanford Hall Reno.</td>
<td>$153,177</td>
<td>$243,070</td>
<td>$243,070</td>
<td>58.7%</td>
<td>0.0%</td>
<td>1</td>
</tr>
<tr>
<td>Colvard Reno.</td>
<td>$104,127</td>
<td>$#VALUE!</td>
<td>$104,127</td>
<td>0.0%</td>
<td>0.0%</td>
<td>1</td>
</tr>
</tbody>
</table>

Percentage of Projects within Design: 54%

Tactic Measurement is 54%

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

• 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 – Second Quarter FY 2014

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>1st Qtr. FY-14</td>
<td>4</td>
<td>3</td>
<td>57%</td>
</tr>
<tr>
<td>2nd Qtr. FY-14</td>
<td>0</td>
<td>0</td>
<td>N/A</td>
</tr>
</tbody>
</table>

Tactic Measurement for 2nd Quarter is N/A
Facilities Management Strategic Planning Session – Second Quarter FY 2014

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

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

Tactic is currently at 90.9%. Goal is 95%
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 – Second Quarter FY 2014

GOAL #3  Foster a Customer Focused Organization

Objective 3.1:  Continuously improve customer service/satisfaction
Tactic 3.1.1:  Achieve overall FM customer satisfaction of 90%
Measure:  Annual Customer Survey results: Percentage of customers agreeing or strongly agreeing with the statement: “Overall I am satisfied with the service I received from Facilities Management”

Lead: Facilities Management Wide
Balanced Scorecard Category: Customer Perspective

ACTION PLAN

- **Customer Satisfaction Survey:** Preliminary discussions with the Urban Institute have begun to update and administer for FY 13-14. **Launches April 14, 2014; results available July, 2014**
  - Note: Reviewed new APPA survey November 2013 - does not meet FM annual survey needs. Total of nine questions.

- **Customer Service Handbook:** Update and remarket handbook. **Summer 2014**

- **FM External Communication Campaign:** Creating a Campus of Distinction. Multiple marketing channels. **Spring 2014**
Facilities Management Strategic Planning Session – Second Quarter FY 2014

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 involved with performance of ESCO contract and ensure temperature policies are not sacrificed for energy conservation.
2 – Ensure that Zones are checking BAS and monitoring conditions.
3 – Continue to develop controls section and cross train with Zones.
4 – Continue to work with Capital to get buildings commissioned and retro commissioned.
5 – Ensure that we are following UNC Charlotte Temperature Control Policy.
6 – Work with customers; educate them on the policy and monitor complaints for accuracy.
Facilities Management Strategic Planning Session – Second Quarter FY 2014

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 by 20%

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Total</th>
<th>Hot</th>
<th>Cold</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Qtr FY14</td>
<td>162</td>
<td>101</td>
<td>61</td>
</tr>
<tr>
<td>2nd Qtr FY14</td>
<td>173</td>
<td>91</td>
<td>82</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Total</th>
<th>Hot</th>
<th>Cold</th>
</tr>
</thead>
<tbody>
<tr>
<td>3rd Qtr FY14</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>4th Qtr FY14</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

Goal: Decrease by 20%
(129.6)
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

Working to create Survey
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 – Second Quarter FY 2014

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
Tactic 4.1.2: Reduce Number of Employees Terminated During Probationary Period to less than 5%

Lead: Facilities Business Office
Balanced Scorecard Category: Internal Business Process

ACTION PLAN

- Continue to monitor position vacancies and hiring processes to ensure 6-month abolishment threshold is not reached. *(Ongoing)*

- Continue to develop resources that result in increased applicant pools. To date, we are posting our positions (as appropriate) on additional free websites such as: Learn 4 Good, Central Piedmont Community College, The Latin American Coalition, and The Job Network. This should result in creating a more diverse and qualified pool of applicants for referral and selection. *(Ongoing)*

- Ensuring all position descriptions/postings contains verbiage that request necessary communication skills, computer skills, English language comprehension skills and skills that demonstrate an employee’s ability to work/interact with others. *(Ongoing)*

- Monitor timeframe of applicant referral to interview to hire. Maintain communications with hiring supervisors requesting status updates. Provide assistance as needed and/or request to keep the process moving. *(Ongoing)*
Facilities Management Strategic Planning Session – Second Quarter FY 2014

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
Tactic 4.1.2: Reduce Number of Employees Terminated During Probationary Period to less than 5%

Lead: Facilities Business Office
Balanced Scorecard Category: Internal Business Process

ACTION PLAN

• Ensure targeted selection methods are consistently utilized. (Ongoing)

• Provide assistance to hiring supervisors on appropriate verbiage when establishing selection and/or non-selection criteria in our postings and hiring proposals to ensure a quick turnaround on approvals of hiring proposals. (Ongoing)

• With the new 24-Month Probationary Period, continue to monitor separation data that allows us to report employee turnover during the probationary period. (August 22, 2015)
Facilities Management Strategic Planning Session – Second Quarter FY 2014

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: Internal Business Process

#### Average Number of Days to Fill Non-exempt Vacancies

<table>
<thead>
<tr>
<th>Quarter</th>
<th># Days to Fill Vacancies</th>
<th># of Non-exempt Hires</th>
<th>Average Number of Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q1</td>
<td>95</td>
<td>17</td>
<td></td>
</tr>
<tr>
<td>Q2</td>
<td>91</td>
<td>16</td>
<td></td>
</tr>
<tr>
<td>Q3</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Q4</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

Target: 80 Days

4% Decrease in # of days from last quarter
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: Internal Business Process

Average Number of Days to Fill Exempt (Salaried) Vacancies

- Q1: 3 days
- Q2: 4 days
- Q3: 0 days
- Q4: 0 days

- 23% below target of 120 days

# of Exempt Hires
Average Number of Days

STATUS

Lead FBO
Facilities Management Strategic Planning Session – Second Quarter FY 2014

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:  Internal Business Process

<table>
<thead>
<tr>
<th></th>
<th>Q1</th>
<th>Q2</th>
<th>Q3</th>
<th>Q4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Separations</td>
<td>9</td>
<td>7</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Q1: Separations</td>
<td>3</td>
<td>5</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Q2: Separations</td>
<td>2</td>
<td>1</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

- **Employee's Separated During FY 14**
- **Total Separations:** 9
- **Q1 Separations:** 3
- **Q2 Separations:** 2
- **Q3 Separations:** 0
- **Q4 Separations:** 0

**Status:**
- **Retirement:** 0%
- **Involuntary:**
- **Involuntary During Probation:**

**Lead FBO:**

**Measure:** Percent Employees Terminated before end of probationary period.
Facilities Management Strategic Planning Session – Second Quarter FY 2014

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
Providing tools & skills to maximize human capital.

ACADEMY MISSION: Provide the tools & skills to maximize human capital.

FM-HR VISION: Hiring & Developing the Right People with the Right Skills to do the Right Jobs.

FACILITIES MANAGEMENT: Develop a valued, well trained, motivated, & diverse workforce.

BUSINESS AFFAIRS: Maximize Human Capital.
Facilities Management Strategic Planning Session – Second Quarter FY 2014

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

FM Academy Development
- Identify areas for development & align with FM Values
- Working with Facilities Operations to determine OSHA required training
- Researching Leadership development opportunities

Training Records Management
- Reminders to submit records
- Annual training targets (20 & 40 hours)

Needs Assessment/Training Opportunities:
- Researching Cultural awareness & Diversity training
  - Vendor search
- Employee Relations
  - Training on disciplinary documentation - In development
- Administrative Developmental Matrix - Rolled out, February 2014
- HVAC Developmental Matrix - In development
Facilities Management Strategic Planning Session – Second Quarter FY 2014

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>Completed</th>
</tr>
</thead>
</table>

TRAINING

Technical (on-site delivery)
- VFD Training
  - July 2013
- Pump Repair & Maintenance
  - December 2013
- PLCs for Non-programmers
  - February 2014
- EPA 608 Technician Certification Exam
  - (TBD)

“Mini-Series” training sessions (partnership with Grainger)
- ARC Flash Awareness
  - February 2013
- LED lighting
  - September 2013
- FIRE STOP
  - October 2013

Safety Awareness
- Supervisor Safety Talks
  - Ongoing, monthly
- EH&S safety training
  - EH&S website

Leadership
- Supervisor Forum
  - Quarterly
- SRAPPA Supervisor Toolkit workshop (UNCC hosting)
  - March 2014
Facilities Management Strategic Planning Session – Second Quarter FY 2014

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 14
Training Hours for Supervisors & Managers by Quarter

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

Fiscal 2014 Results:
Target - 1,960 hrs
2nd Qtr Target – 980 hrs
Actual = (39%)

Actual YTD
378.5 hrs (19 %)
Facilities Management Strategic Planning Session – Second Quarter FY 2014

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 14
Training Hours for front line employees by Quarter

Training Hours

Q1: 1,263.25 hrs
Q2: 1,356.4 hrs
Q3: 2619.65 hrs
Q4:

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

Fiscal 2014 Results:
Annual Target- 7,760 hrs

2nd Qtr Target - 3.880 hrs
Actual = 2619.65 hrs (68%)

Actual YTD
2619.65 hrs (34%)
Facilities Management Strategic Planning Session – Second Quarter FY 2014

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

Actions Planned:

• Directors should receive a copy for their review and for use in the development of action items – March 2014.
• Improve practice instituted in November 2013 of meeting with BES and FO leadership to develop schedules for their respective units to take survey at the UI computer lab – November 2014.
• Provide BES and FO with advance materials to present to their teams to show how the survey will be administered. This may include screenshots or a sample question and answer format – November 2014.
Facilities Management Strategic Planning Session – Second Quarter FY 2014

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

ACTION PLAN

• Ongoing safety related activities to foster continuous awareness
  • Supervisor Safety Talks
  • FM Safety Fair
  • Safety Slogan Contest

• Accident/Incident review for 2013
  • Accidents down 42% from 2012
  • Minor incidents down 86% from 2012

• Mandatory compliance training (OSHA)
  • F/O reviewing training needed
  • Reporting of training activities to be sent to FM-HR Staff Dev. Specialist
Facilities Management Strategic Planning Session – Second Quarter FY 2014

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

FM Accident Trends

<table>
<thead>
<tr>
<th>Year</th>
<th>Accidents (Long Form)</th>
<th>First Aid Only</th>
</tr>
</thead>
<tbody>
<tr>
<td>2004</td>
<td>45</td>
<td></td>
</tr>
<tr>
<td>2005</td>
<td>37</td>
<td></td>
</tr>
<tr>
<td>2006</td>
<td>40</td>
<td></td>
</tr>
<tr>
<td>2007</td>
<td>28</td>
<td></td>
</tr>
<tr>
<td>2008</td>
<td>26</td>
<td></td>
</tr>
<tr>
<td>2009</td>
<td>24</td>
<td></td>
</tr>
<tr>
<td>2010</td>
<td>17</td>
<td></td>
</tr>
<tr>
<td>2011</td>
<td>24</td>
<td></td>
</tr>
<tr>
<td>2012</td>
<td>19</td>
<td></td>
</tr>
<tr>
<td>2013</td>
<td>11</td>
<td></td>
</tr>
</tbody>
</table>

Target <=15

STATUS
Facilities Management Strategic Planning Session – Second Quarter FY 2014

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

*FO studying required training and reporting structure*
Facilities Management Strategic Planning Session – Second Quarter FY 2014

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

• Further development of FM Academy
  – Marketing Strategy
  – Content Development
  – Vendor Selection and Delivery

• HVAC Matrix Development – F/O will recommend matrix team members and development work to begin in Feb
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
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

• Result for the following submission is as follows:
  – NCAPPA Award for FM’s Recognition Program – Award request supported by AVC and submitted; expect response in January 2014.
• FY 2013 APPA Facilities Performance Indicators Survey was submitted on time. The BETA report is expected to be available in late January/February, with the final report published in March 2014.
• Recruitment for a new Procurement/Grants Specialist will begin in January 2014.
Facilities Management Strategic Planning Session – Second Quarter FY 2014

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

**FACILITIES MANAGEMENT OPERATIONS: December 31, 2013**

<table>
<thead>
<tr>
<th>ACCOUNT DESCRIPTION</th>
<th>2013-14 Budget</th>
<th>% of TOTAL BUDGET</th>
<th>YTD ACTIVITY</th>
<th>ENCUMBRANCES</th>
<th>TOTAL EXPENDITURES</th>
<th>REMAINING BALANCE</th>
<th>VARIANCE (budgeted vs actual)</th>
</tr>
</thead>
<tbody>
<tr>
<td>OVERTIME AND PREMIUM PAY</td>
<td>$310,000</td>
<td>7%</td>
<td>-</td>
<td>$310,000</td>
<td>$310,000</td>
<td>-</td>
<td>$82,421 F</td>
</tr>
<tr>
<td>STUDENT AND TEMPORARY WAGES</td>
<td>$131,500</td>
<td>3%</td>
<td>$49,079</td>
<td>-</td>
<td>$40,079</td>
<td>$82,421</td>
<td>$96,595 F</td>
</tr>
<tr>
<td>PERSONAL SERVICE CONTRACTS</td>
<td>$101,500</td>
<td>2%</td>
<td>$1,852</td>
<td>$3,053</td>
<td>$4,905</td>
<td>$96,595</td>
<td>$372,760 F</td>
</tr>
<tr>
<td>CORPORATE SERVICES (Serv Agr)</td>
<td>$997,363</td>
<td>23%</td>
<td>$295,062</td>
<td>$329,541</td>
<td>$624,604</td>
<td>$372,760</td>
<td>$72,398 F</td>
</tr>
<tr>
<td>OTHER ADMINISTRATIVE EXPENSES</td>
<td>$83,000</td>
<td>2%</td>
<td>$10,602</td>
<td>-</td>
<td>$10,602</td>
<td>$72,398</td>
<td>$65,684 F</td>
</tr>
<tr>
<td>DOMESTIC TRAVEL/TRAINING</td>
<td>$100,000</td>
<td>2%</td>
<td>$34,336</td>
<td>-</td>
<td>$34,336</td>
<td>$65,684</td>
<td>$56,642 F</td>
</tr>
<tr>
<td>FIXED PURCHASED SERVICES (Maint Agr)</td>
<td>$250,274</td>
<td>7%</td>
<td>$80,032</td>
<td>$88,600</td>
<td>$178,633</td>
<td>$111,642</td>
<td>$195,250 F</td>
</tr>
<tr>
<td>OTHER PURCHASED SERVICES</td>
<td>$277,950</td>
<td>7%</td>
<td>$61,339</td>
<td>$21,355</td>
<td>$82,694</td>
<td>$195,250</td>
<td>$195,250 F</td>
</tr>
<tr>
<td>SUPPLIES</td>
<td>$1,579,411</td>
<td>37%</td>
<td>$364,220</td>
<td>$88,852</td>
<td>$433,072</td>
<td>$1,148,339</td>
<td>$1,148,339 F</td>
</tr>
<tr>
<td>EQUIPMENT/IT</td>
<td>$315,700</td>
<td>7%</td>
<td>$103,461</td>
<td>7</td>
<td>$103,468</td>
<td>$212,232</td>
<td>$212,232 F</td>
</tr>
<tr>
<td>CAPITAL OUTLAY</td>
<td>-</td>
<td>0%</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>FIXED CHARGES</td>
<td>$28,430</td>
<td>1%</td>
<td>$1,904</td>
<td>658</td>
<td>2,562</td>
<td>$25,868</td>
<td>$25,868 F</td>
</tr>
<tr>
<td>RECYCLING</td>
<td>$39,695</td>
<td>1%</td>
<td>$13,432</td>
<td>4,136</td>
<td>17,568</td>
<td>$22,127</td>
<td>$22,127 F</td>
</tr>
</tbody>
</table>

**How the FM Budget is Allocated**

- Student and Temporary Wages
- Personal Service Contracts
- Corporate Services (Serv Agr)
- Other Administrative Expenses
- Domestic Travel/Training
- Fixed Purchased Services (Maint Agr)
- Other Purchased Services
- Supplies
- Equipment/IT
- Capital Outlay
- Fixed Charges
- Recycling

**STATUS**
Facilities Management Strategic Planning Session – Second Quarter FY 2014

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
Facilities Management Strategic Planning Session – Second Quarter FY 2014

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

Administrative Total Cost per GSF

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

UNC Charlotte Admin Cost/GSF = $0.40
SRAPPA Region Average = $0.40
Peer Institution Average = $0.475
Target = $0.45125
GOAL #5 – 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 Complete
  – Submitted square footage cleaned by BES to FBO for inclusion in the annual APPA survey
  – Requested one-time funds for supply chain management project
  – Installed hand dryers in Fretwell for pilot study

• Actions Planned
  – February paper use count in Fretwell
  – Hand dryer survey (of building occupants) in Fretwell
  – Consider developing a BES strategic dashboard that tracks cost, quality, and process data points over time
  – Monitor and report custodial cost/student FTE on an annual basis using data from APPA survey
  – Supply chain management improvements (funding requested)
Facilities Management Strategic Planning Session – Second Quarter FY 2014

GOAL #5 – Promote Good Stewardship

Objective: 5.1: Promote Fiscal Responsibility
Tactic 5.1.4: Achieve Custodial Costs/Student FTE ± 5% of APPA Average for Peer Institutions
Measure: Administrative cost/GSF from annual APPA Facilities Performance Indicators Report.
Measure: Custodial Costs/Student FTE from annual APPA Facilities Performance Indicators Report (APPA Benchmark)

Balanced Scorecard Category: Financial Perspective

Custodial-Total Cost/Student FTE

- Average cost/student = $217.99
- UNCC = 6.105% above average
- UNCC = 33.774% below SRAPPA average

<table>
<thead>
<tr>
<th>Institution</th>
<th>Custodial Cost/Student FTE</th>
</tr>
</thead>
<tbody>
<tr>
<td>East Carolina University</td>
<td>$204.43</td>
</tr>
<tr>
<td>Portland State University</td>
<td>$204.42</td>
</tr>
<tr>
<td>University of New Mexico</td>
<td>$227.53</td>
</tr>
<tr>
<td>University of North Carolina at Charlotte</td>
<td>$231.30</td>
</tr>
<tr>
<td>University of Texas San Antonio</td>
<td>$222.31</td>
</tr>
<tr>
<td>SRAPPA Region</td>
<td>$349.23</td>
</tr>
</tbody>
</table>
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 – Make sure that data submitted is correct.
2 – Continue to look for opportunities to expand reimbursable PM work to level peaks and valleys.
3 – Continue to look within our Facilities Operations Labor pool before going outside for additional staff support.
4 – Continue to track Labor Services accounts with FO Leadership and work closely with FBO to improve processes.
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
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
Facilities Management Strategic Planning Session – Second Quarter FY 2014

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
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
  • Continue to conduct Waste audits for campus to determine amount of recyclables in waste stream
  • Continue zero waste efforts at final football game; begin working on changes and adjustments for next season.

• C & D
  • Continue collecting/tracking recycling information and acting as resource for contractors.
Facilities Management Strategic Planning Session – First Quarter FY 2014

GOAL #5 – Promote Good Stewardship

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
Capital Projects

FY 13 Total: 90.0%
1st Qtr 14: 69.6%

Tons Landfilled
Tons Recycled

Tons Landfilled
Tons Recycled
Facilities Management Strategic Planning Session – Second Quarter FY 2014

GOAL #5 – Promote Good Stewardship

Objective 5.2 Develop a Sustainable Campus
Tactic 5.2.2 Increase Percent of Solid Waste diversion on Campus to 45% by 2018
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>2008 Baseline</th>
<th>2013 3rd Qtr</th>
<th>2013 4th Qtr</th>
<th>2014 1st Qtr</th>
<th>2014 2nd Qtr</th>
</tr>
</thead>
<tbody>
<tr>
<td>Series 1</td>
<td>198 tons</td>
<td>269 tons</td>
<td>347 tons</td>
<td>297 tons</td>
<td>159 tons</td>
</tr>
<tr>
<td>Series 2</td>
<td>695 tons</td>
<td>775 tons</td>
<td>833 tons</td>
<td>779 tons</td>
<td>529 tons</td>
</tr>
<tr>
<td>Breakdown</td>
<td></td>
<td></td>
<td>42%</td>
<td>38%</td>
<td>30%</td>
</tr>
<tr>
<td>Total</td>
<td>893 tons</td>
<td>1,044 tons</td>
<td>1,180 tons</td>
<td>1,076 tons</td>
<td>688 tons</td>
</tr>
</tbody>
</table>
Facilities Management Strategic Planning Session – Second Quarter FY 2014

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

• Achieve Bronze Rating for STARS by end of FY 15
  o Inventory STARS points and estimate current score and gaps by May 2014.
  o Draft plan to earn further credits to achieve Bronze rating by July 2014.
  o Document performance-based STARS credits (50%) by Oct. 2014.
  o Document descriptive/policy-based STARS Credits (50%) by January 2015.
  o File for rating in March 2015.
Facilities Management Strategic Planning Session – Second Quarter FY 2014

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
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

• Implement 60% of Recommended Sustainability Best Practices by end of FY 15.
  o Derive a list of Best Practices derived from Sustainability Plan and Climate Action Plans by March 2014.
  o Assess listed Best Practices for implementation stage and needs by May 2014.
  o Draft plan to implement 60% of Best Practices in <1 year by July 2014.
  o Draft plan to implement 90% of Best Practices in <5 years by December 2014.
Facilities Management Strategic Planning Session – Second Quarter FY 2014

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
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 in construction
  - Will reduce campus consumption by another 4%
- System Wide Lighting Performance Contract - scheduled to go into construction April 2014
- SAC Energy Upgrade
- Continue retro-commissioning program
- Exterior Lighting upgrades to LED
Facilities Management Strategic Planning Session – 2nd QTR FY 2014

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 – 2nd QTR FY 2014

GOAL #5 – Promote Good Stewardship

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

Measure: Gallons/GSF/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 20 Gal/GSF
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

- Establish project specific HUB participation goals – ongoing
- Identify scopes of work applicable to HUB availability - ongoing
- Provide contact information for certified HUB firms that can bid scopes of work - ongoing
- Develop guidance for doing business with UNC Charlotte - ongoing
- Establish procedures for reviewing Good Faith Efforts documentation – completed
- Review Good Faith Efforts documentation for compliance before awarding 1st tier subcontractor contracts – ongoing
- Conduct/participate in events promoting education and outreach for HUB firms
  - Construction Meet & Greet – March 5, 2014
  - Opportunities 2014 – March 10, 2014
Facilities Management Strategic Planning Session – Second Quarter FY2014

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
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

![African American Participation Chart]

**African American Participation**
Capital Projects > $500K

- **FY2012:** $160M, 12%
- **FY2013:** $100M, 6.4%
- **1st Qtr 14:** $80M, 3.5%
- **2nd Qtr 14:** $0, 0%

**5% GOAL**

- Total Capital Project Dollars
- Capital Project Dollars w/African American Firms

**STATUS**
Facilities Management Strategic Planning Session – Second Quarter FY2014

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

Informe Projects > $30K
HUB Partications

15% GOAL

<table>
<thead>
<tr>
<th></th>
<th>FY2012</th>
<th>FY2013</th>
<th>1stQtr14</th>
<th>2ndQtr14</th>
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<tr>
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<td>$1,500,000</td>
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<tr>
<td>Informal Project Dollars w/HUB Firms</td>
<td>$500,000</td>
<td>$1,000,000</td>
<td>$1,500,000</td>
<td>$2,000,000</td>
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<th>2ndQtr14</th>
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<td>HUB Partications</td>
<td>47%</td>
<td>47%</td>
<td>44.4%</td>
<td>95.5%</td>
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</table>
Facilities Management Strategic Planning Session – Second Quarter FY 2014

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 on Informal Projects below $30,000 (Construction only) divided by Total Contracts |
| 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**

- Design Services’ HUB participation improvement is currently focused on African American contractors & vendors.

**IMPLEMENTED ACTIONS AND PLANS**

- All Coordinators are encouraged to reach out to new vendors for work on our Under $30K projects - Ongoing.
  - Project Coordinators review and discuss at our Design Services weekly Tuesday morning meetings.
  - Amanda acts as advisor for other Coordinators; providing new vendor contacts as they are vetted.

- Continue to refine HUB reporting information for Strategic Planning - Ongoing.

- Continue to work with FIS on reports for extracting project data from ARCHIBUS - Ongoing.
Facilities Management Strategic Planning Session – Second Quarter FY 2014

GOAL #5 – Promote Good Stewardship

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

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

Lead: Design Services

Balanced Scorecard Category: Internal Business Process

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

<table>
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<tr>
<th>QUARTERLY REVIEW</th>
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<th>H.U.B. Contribution</th>
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<tbody>
<tr>
<td>FY '09</td>
<td>$996,756</td>
<td>$89,479</td>
<td>9.0%</td>
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<tr>
<td>FY '10</td>
<td>$1,452,202</td>
<td>$88,703</td>
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<td>FY '11</td>
<td>$3,924,102</td>
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13% Overall HUB Participation
Informal Projects Below $30,000

GOAL
ALERT

Facilities Management Strategic Planning Session – Second Quarter FY 2014

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

Balanced Scorecard Category: Internal Business Process

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

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