Facilities Management
Quarterly Strategic Planning Report
Third Quarter – Fiscal Year 2016
January – March 2016

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

Actions Planned

1. Daily assignment; coordinating and monitoring of work effort.
2. Continue assignment of lead technician in absence of supervisor.
3. Supervisors and Managers weekly assignment; “Manage by Walking around.”
4. Continue to work with Zones and Shops to increase efficiencies.
5. Work with FBO and FIS to select company for the RFP “Work Order Process Improvement”

Actions Completed

1. PILOT PROGRAM: Checks and balances for all reimbursable work orders using hard copy spreadsheet
2. Weekly review of work assignment completion.
3. Work with FBO and FIS to finalize RFP “Work Order Process Improvement”
4. Completed initial training in all Zones “Operating like a business.”
5. Adjusted break schedule to maximize efficiency.
Facilities Management Strategic Planning Session – Third Quarter FY 2016

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

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Goal</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Qtr FY16</td>
<td>60.0%</td>
<td></td>
</tr>
<tr>
<td>2nd Qtr FY16</td>
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<td></td>
</tr>
<tr>
<td>4th Qtr FY16</td>
<td>0.0%</td>
<td></td>
</tr>
</tbody>
</table>

Goal = Maintain Wrench Time at 70%
Facilities Management Strategic Planning Session – Third Quarter FY 2016

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. Monitor the requisition to PO processing time and discuss weekly.
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 – Third Quarter FY 2016

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>Average Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Qtr FY16</td>
<td>4.00</td>
</tr>
<tr>
<td>2nd Qtr FY16</td>
<td>5.19</td>
</tr>
<tr>
<td>3rd Qtr FY16</td>
<td>5.70</td>
</tr>
<tr>
<td>4th Qtr FY16</td>
<td>5.19</td>
</tr>
</tbody>
</table>

Goal 3.5 Days
Facilities Management Strategic Planning Session – Third Quarter FY 2016

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. Emphasize Facilities Operations OP-16 Timely and Accurate Handling/Processing of WRs; adjust work flow process for efficiency.
4. Continue to communicate work order priorities (Quarterly Customer, Building Liaison and specific College Meetings); implemented Sept 2015.
5. Supervisors meeting with technicians on a daily basis.
6. Finalize work flow diagram
7. Continue to identify key players in work flow management.
8. Identify ways to maximize utilization of ARCHIBUS.

Actions Completed

1. Reduced active work orders on 30 Day Report by 30%.
2. Identified key players in work flow management.
Facilities Management Strategic Planning Session – Third Quarter FY 2016

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 equals < 15% (891)
Facilities Management Strategic Planning Session – Third Quarter FY 2016

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 < 10% (512.32)
Facilities Management Strategic Planning Session – Third Quarter FY 2016

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
  – Full utilization of Daily Logs via Google Forms by Zone Supervisors and Lead Technicians (2/2016)

• Actions Planned
  – Implement new quarterly self-audit process in ARCHIBUS – Monthly inspection of PMs per building (5/2016)
  – Update Hiring Process/Flow Chart (5/2016)
  – Develop BES&R internal web-based portal – working with NiCole Lynch and Frank Stewart (5/2016)
  – Attend Workloading Training (6/2016)
  – Workload McEniry building (8/2016)
  – Implement cleaning for Health Model with zones (8/2016)
  – Implement In-service training curriculum and matrix (12/2016)
  – Develop Standard Operating Procedures Manual (SOP) for BES&R (ongoing)
Facilities Management Strategic Planning Session – Third Quarter FY 2016

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

APPALevels

Percentage = 77%
Facilities Management Strategic Planning Session – Third Quarter FY 2016

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

(OS1) Baseline Audit Scores - Job Category

- Cleaning Wrkr.: 8%
- Training: 8%
- Safety: 9%
- Workloading/Logistics: 6%
- Supervision/Management: 9%
- Benchmarking: 8%
Facilities Management Strategic Planning Session – Third Quarter FY 2016

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

(OS1) Baseline Audit Scores - Organization Comparison

- UNC Chapel Hill
- U Mich
- WFU
- MSU
- MT SAC
- Provo School District
- UNC Charlotte
- STANDARD

Percentage

0 10 20 30 40 50 60 70 80

13 8 12 12 11 6 8 80
Facilities Management Strategic Planning Session – Third Quarter FY 2016

GOAL #1 – Continuously Improve Operation of Campus Facilities

Objective: 1.5: Improve Facility Systems Reliability

Tactic: 1.5.1: Improve Completion of Preventive 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. Reorganize PM Program
2. Complete conversion from old PM Module to new PM Module.
3. Continue expansion of PM Program and predictive maintenance program. Work with key customers.
4. Restructure the ARCHIBUS PM Equipment Manager module.
5. Meeting with customers to review and discuss PM implementation.
6. Continue to identify non-traditional equipment that requires PM
7. FCAP is identifying and prioritizing equipment conditions and needs, for replacement. This information is used to support CRDM projects.
8. Continue to emphasize and update the Customer Handbook; get out and see the customer; swiftly and accurately report outages.

Actions Completed

1. Incorporated FCAP inspection process into CRDM and Daily Operations.
2. Hired PM Supervisor.
Facilities Management Strategic Planning Session – Third Quarter FY 2016

GOAL #1 – Continuously Improve Operations of Campus Facilities
Objective: 1.5: Improve Facility Systems Reliability
Tactic: 1.5.1: Improve Completion of Preventative Maintenance Work Requests to 90%
Measure: Percentage of Preventive Maintenance Work Requests Completed

Lead: Facilities Operations
Balance Scorecard Category: Internal Business Process

Improve Completion of PM Work Orders

100.0%
90.0%
80.0%
70.0%
60.0%
50.0%
40.0%
30.0%
20.0%
10.0%
0.0%
1st Qtr FY16 2nd Qtr FY16 3rd Qtr FY16 4th Qtr FY16

Goal to 90%

85.7% 84.3% 80.6% 0.0%
Facilities Management Strategic Planning Session – Third Quarter FY 2016

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 – Third Quarter FY 2016

GOAL #1 – Continuously Improve Operations of Campus Facilities
Objective: 1.5: Improve Facility Systems Reliability
Tactic: 1.5.3: Fewer than 5 unscheduled outages per quarter
Measure: Number of Occurrences; Electric, Water, Sewer, HVAC, (Roofs, Lots, Decks, Roads measured separately).

Lead: Facilities Operations
Balance Scorecard Category: Customer Perspective

Unscheduled Outages

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Unscheduled Outages</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Qtr FY16</td>
<td>4.0</td>
</tr>
<tr>
<td>2nd Qtr FY16</td>
<td>1.0</td>
</tr>
<tr>
<td>3rd Qtr FY16</td>
<td>3.0</td>
</tr>
<tr>
<td>4th Qtr FY16</td>
<td>0.0</td>
</tr>
</tbody>
</table>

Goal = Less than 5 incidents/Qtr
Facilities Management Strategic Planning Session – Third Quarter FY 2016

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.5: Improve Facility Systems Reliability

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

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

Lead: Facilities Operations

Balance Scorecard Category: Customer Perspective

Improve Ratio of Preventive/Predictive Work Requests

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Qtr FY16</td>
<td>52.2%</td>
</tr>
<tr>
<td>2nd Qtr FY16</td>
<td>55.1%</td>
</tr>
<tr>
<td>3rd Qtr FY16</td>
<td>57.8%</td>
</tr>
<tr>
<td>4th Qtr FY16</td>
<td>0.0%</td>
</tr>
</tbody>
</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
Facilities Management Strategic Planning Session – Third Quarter FY 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 Planned:

6. Complete and Finalize End of year Projects / Invoicing by June 5th.
7. Finalize FY Building Automation System Building upgrade projects by June 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:**

1. Completed and Deployed Mobile Recycling project.
2. Finalized Real Estate Updates.
4. Finalize Real Estate Lease application updates.
5. Complete SDI Enhancements and Worked with SDI and FO to Identify Billing and Document Trend Issues for resolution.
FM Prioritized Projects – FY16

1. ARCHIBUS Real Estate Leases and Suites – Completed Feb 2016
2. Access and Key Management – Roll over; Estimated Completion Jun 2016
3. FO Refrigeration – Asbestos – Estimated Completion May 2016
4. Motor Fleet Options Updates – Completed Feb 2016
5. Mobile Recycling – Roll over; Completed Mar 2016
6. Mobile BES Equipment Survey – Roll over; Completed Apr 2016
7. Mobile Space Survey – Roll over; Completed Dec 2015
8. Mobile Map Utilities Field Units – Roll Over; Completed Nov 2015
9. GIS Departmental Map Search – New Estimated Completion May 2016
11. NVR Upgrade Phase 2 – Estimated Completion Apr 2016
13. GIS Wayfinding Digital Signage System New Estimated Completion June 2016
14. FCAP Mobile – Estimated Completion May 2016
15. JIRA FIS Project Management – Completed Apr 2016
17. ARCHIBUS Mobile Proof of Concept – Roll over; Completed Oct 2015
18. BIM Belk Gym – Roll over; Completed Dec 2015
19. GIS Space Mgmt. Set Up – Roll Over; Completed Feb 2016
20. SDI Enhancements – Roll Over; New Estimated Completion May 2016
22. ARCHIBUS Shibboleth – Estimated Completion May 15, 2016
23. Open Options Scripting Updates – New Estimated Completion June 1, 2016
24. End of Year BAS Projects – Estimated Completion June 2016
25. FY Radio System Repairs – Estimated Completion June 2016

Projects Moved to FY17
1. ImageNOW Phase 2: Capital
2. Mobile PM & WR for IPad
3. GIS Master Plan Map
4. ARCHIBUS Work Order Process Reinvention Support
5. ARCHIBUS Upgrade
6. ARCHIBUS Testing Framework
7. ARCHIBUS Training Workflow
Facilities Management Strategic Planning Session – Third Quarter FY 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
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

Qtr 1 FY16: 10.00%
Qtr 2 FY16: 20.00%
Qtr 3 FY16: 67.20%
Qtr 4 FY16: 0.00%

3rd QTR GOAL
Facilities Management Strategic Planning Session – Third Quarter FY 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
Measure: Percent Completion of Five-Year Technology Projects
Based upon Cumulative Average of Project Completion

Balanced Scorecard Category: Internal Business Processes

FIS Weighted Project Completion Average

Qtr 1 FY16: 21.59%
Qtr 2 FY16: 36.41%
Qtr 3 FY16: 60.18%
Qtr 4 FY16:
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

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

Measure: Percent Completion of Five-Year Technology Projects

Project Status Completion Percentage

Balanced Scorecard Category: Internal Business Processes
Facilities Management Strategic Planning Session – Third 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: Customer

| 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:

- Convert Scope & Budget to format in ARCHIBUS similar to Estimating Workbook.
  - Timeline: *FY16 QTR 2 – DESIGN SERVICES TESTING PHASE IS NOW ONGOING*

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 1 – 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 – Third 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:** Customer

<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><strong>Measure:</strong></td>
<td>Percentage (Number of Construction Projects completed on or before delivery date divided by total number of project completed.)</td>
</tr>
</tbody>
</table>

**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>
<tbody>
<tr>
<td>FY11</td>
<td>224</td>
<td>200</td>
<td>24</td>
<td>89.3%</td>
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<tr>
<td>FY12</td>
<td>240</td>
<td>231</td>
<td>9</td>
<td>96.3%</td>
</tr>
<tr>
<td>FY13</td>
<td>139</td>
<td>134</td>
<td>5</td>
<td>96.4%</td>
</tr>
<tr>
<td>FY14</td>
<td>221</td>
<td>211</td>
<td>10</td>
<td>95.5%</td>
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<td>FY15</td>
<td>216</td>
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<td>FY16</td>
<td>68</td>
<td>65</td>
<td>3</td>
<td>95.6%</td>
</tr>
<tr>
<td>Q 1</td>
<td>19</td>
<td>18</td>
<td>1</td>
<td>94.7%</td>
</tr>
<tr>
<td>Q 2</td>
<td>27</td>
<td>27</td>
<td>0</td>
<td>100.0%</td>
</tr>
<tr>
<td>Q 3</td>
<td>22</td>
<td>20</td>
<td>2</td>
<td>90.9%</td>
</tr>
<tr>
<td>Q 4</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.0%</td>
</tr>
</tbody>
</table>

**FY16 STATUS**

- 68
- 65
- 3
- 95.6%

**FY11**

- 89.3%
- 96.3%
- 96.4%
- 95.5%
- 95.4%

**FY12**

- 90.9%

**FY13**

- 94.7%

**FY14**

- 100.0%

**FY15**

- 95.6%
Facilities Management Strategic Planning Session – Third Quarter FY 2016

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 2016.

Lead: Facilities Planning
Balanced Scorecard Category: Internal Business Process

ACTION PLAN

- Continue to update CRDM data (ongoing)
- Integrate feedback from users of 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 2016)

STATUS
Facilities Management Strategic Planning Session – Third Quarter FY 2016

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 2016.

Measure: Average Building FCI for campus

Lead: Facilities Planning

Balanced Scorecard Category: Internal Business Process
Facilities Management Strategic Planning Session – Third Quarter FY 2016

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
  - Complete studies related to future Capital projects, Belk Pool Study, Friday Settlement Issue, Light Rail Circulation Study, and Craver and Mary Alexander Road Intersection Sector Study - future building site cost analysis (proposed Science site)
Facilities Management Strategic Planning Session – Third Quarter FY 2016

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

• Design completed within original fee: Belk Track Resurfacing, Campus Generators, Campus Infrastructure Renewal Atkins, East Village Utilities, RDH Renovations

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.

• Hire one project manager.
Facilities Management Strategic Planning Session – Third Quarter FY 2016

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

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

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

**Balanced Scorecard Category:** Internal Business Process

<table>
<thead>
<tr>
<th>STRATEGIC REVIEW by Fiscal Year (July-June)</th>
<th>No. of projects authorized in Capstat</th>
<th>Designer under contract w/in 120 days</th>
<th>Designer not under contract w/in 120 days</th>
<th>% Designers under contract w/in 120 days</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>0</td>
<td>0</td>
<td>0</td>
<td>N/A</td>
</tr>
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</tr>
<tr>
<td>4th Qtr. FY-16</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>N/A</td>
</tr>
</tbody>
</table>

Tactic Measurement for 3rd Quarter is N/A
Facilities Management Strategic Planning Session – Third Quarter FY 2016

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective 2.5 Improve the Capital Planning and Design Process
Tactic 2.5.3 90% of designs complete by the scheduled completion date

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

Balanced Scorecard Category: Internal Business Process

<table>
<thead>
<tr>
<th>STRATEGIC REVIEW by Fiscal Year (July-June)</th>
<th>No. of projects completed by scheduled</th>
<th>#not completed by scheduled time</th>
<th>% Designs complete by completion time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summary FY-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>4</td>
<td>3</td>
<td>57%</td>
</tr>
<tr>
<td>1st Qtr. FY-16</td>
<td>1</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>2nd Qtr. FY-16</td>
<td>0</td>
<td>0</td>
<td>N/A</td>
</tr>
<tr>
<td>3rd Qtr. FY-16</td>
<td>3</td>
<td>3</td>
<td>50%</td>
</tr>
<tr>
<td>4th Qtr. FY-16</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Tactic Measurement for 3rd Quarter is 50%

Goal 90%
Facilities Management Strategic Planning Session – Third Quarter FY 2016

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>6</td>
<td>1</td>
<td>86%</td>
</tr>
<tr>
<td>1st Qtr. FY-16</td>
<td>1</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>2nd Qtr. FY-16</td>
<td>0</td>
<td>0</td>
<td>N/A</td>
</tr>
<tr>
<td>3rd Qtr. FY-16</td>
<td>5</td>
<td>1</td>
<td>83%</td>
</tr>
</tbody>
</table>

Tactic Measurement for 3rd Quarter is 83%
Facilities Management Strategic Planning Session – Third Quarter FY 2016

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

| Objective | 2.6 | Improve the Capital Construction Process |
| Tactic    | 2.6.1 | 90% of capital construction Projects completed on time |
|           | 2.6.2 | 95% of Capital Projects completed within the original construction contract amount or Guaranteed Maximum Price (GMP) plus 3% new construction 5% renovation (contingency) |

**ACTION PLAN**

**Actions Complete**
- Campus WiFi

**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 – Third Quarter FY 2016

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>2</td>
<td>4</td>
<td>33%</td>
</tr>
<tr>
<td>1st Qtr. FY-16</td>
<td>1</td>
<td>3</td>
<td>25%</td>
</tr>
<tr>
<td>2nd Qtr. FY-16</td>
<td>0</td>
<td>1</td>
<td>0%</td>
</tr>
<tr>
<td>3rd Qtr. FY-16</td>
<td>1</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>4th Qtr. FY-16</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Tactic Measurement for 3rd Quarter is 100%
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective 2.6

Improve the Capital Construction Process

Tactic 2.6.2

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

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

Balanced Scorecard Category: Internal Business Process

<table>
<thead>
<tr>
<th>STRATEGIC REVIEW by Fiscal Year (July-June)</th>
<th># completed on schedule</th>
<th>not completed on schedule</th>
<th>% completed on time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summary FY-14</td>
<td>6</td>
<td>3</td>
<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>2</td>
<td>4</td>
<td>33%</td>
</tr>
<tr>
<td>1st Qtr. FY-16</td>
<td>1</td>
<td>3</td>
<td>25%</td>
</tr>
<tr>
<td>2nd Qtr. FY-16</td>
<td>0</td>
<td>1</td>
<td>0%</td>
</tr>
<tr>
<td>3rd Qtr. FY-16</td>
<td>1</td>
<td>0</td>
<td>100%</td>
</tr>
</tbody>
</table>

Tactic Measurement for 3rd Quarter is 100%
GOAL #3

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

Foster a Customer Focused Organization
Facilities Management Strategic Planning Session – Second Quarter 2016

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% (proposed) for FM services. |
| Measurement: | 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

ACTION PLAN FOR IMPROVEMENT

**Customer Satisfaction Survey**

**Publicity/Public Relations:**
- **Campus Construction Reports**: Goal to prepare and distribute approx. every six weeks. Last one sent 12/21/15
- **News Releases**: Write and distribute through several media channels. Continual
  - CID projects near completion, Lizotte appointed STAR tech advisor, 2015 Power Partner award, etc.
- **Publicity documentation and analytics**: Will contact Cindy Tribucher and report annually.

**Internal Communications:**
- **Intranet and Web Site** Content review and user feedback. (note: level 0 security information) FIS and WAG meetings to be reinstated;
- **Regularly scheduled communications meetings** with BES and Operations
  - Bimonthly meetings for both with the first scheduled for January 22
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 (June 2016)
4. Continue to include Energy Manager in Bi-Weekly Operations’ meetings
5. Continue daily monitoring of building temperatures within Zones.
6. Develop Utilities Team; hire Utility Manager and Retro Commissioning Supervisor (July 2016)
7. Working with Capital; Retro-commissioning 3 buildings (Cameron, McEniry, Smith) – June 2016
8. Working with Capital; Mechanical Systems Upgrade Project (Kennedy)
9. Develop and implement customer follow-up plan

**Actions Completed**

1. Implemented daily monitoring of temperature using BAS and field verification.
2. Updated temperature policy
3. Improved condensate return for main Steam Plant
Facilities Management Strategic Planning Session – Third Quarter FY 2016

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 – Third Quarter FY 2016

GOAL #3 – Foster a Customer Focused Organization

Objective: 3.1: Continuously Improve Customer Service/Satisfaction

Lead: Design Services
Balanced Scorecard Category: Customer

| Tactic 3.1.3: | 90% of Informal Project Customers are satisfied or very satisfied |
| Measure: | Results from ARCHIBUS – Design Services Projects Customer Survey |

ACTION PLANS FOR IMPROVEMENT

ARCHIBUS - Design Services Customer Survey:

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

• After project is complete, stop by and meet with Customer to review how the renovated space is performing.
  ◊ More and more team members are taking this action.

• Keeping the communication lines open by email, phone and face to face works wonders.
  ◊ Although email is efficient, we are finding some level of telephone and face to face interaction must occur.

• When possible, hold weekly meetings on job site to discuss progress with Customer.
  ◊ This is proving to be widely accepted and very useful.
Facilities Management Strategic Planning Session – Third Quarter FY 2016

GOAL #3 – Foster a Customer Focused Organization

Objective: 3.1: Continuously Improve Customer Service/Satisfaction

Lead: Design Services

Balanced Scorecard Category: Customer

Tactic 3.1.3: 90% of Informal Project Customers are more than satisfied or satisfied
Measure: Results from Project Related Customer Surveys

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

<table>
<thead>
<tr>
<th>Survey Totals by Fiscal Year</th>
<th>Number of Surveys issued</th>
<th>Number of Survey Responses</th>
<th>More than Satisfied</th>
<th>Satisfied</th>
<th>Less than Satisfied</th>
<th>Percent Satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY10</td>
<td>30</td>
<td>30</td>
<td>18</td>
<td>5</td>
<td>0</td>
<td>76.7%</td>
</tr>
<tr>
<td>FY11</td>
<td>33</td>
<td>33</td>
<td>24</td>
<td>6</td>
<td>2</td>
<td>90.9%</td>
</tr>
<tr>
<td>FY12</td>
<td>31</td>
<td>31</td>
<td>27</td>
<td>2</td>
<td>0</td>
<td>93.5%</td>
</tr>
<tr>
<td>FY13</td>
<td>22</td>
<td>22</td>
<td>18</td>
<td>3</td>
<td>0</td>
<td>95.5%</td>
</tr>
<tr>
<td>FY14</td>
<td>24</td>
<td>24</td>
<td>18</td>
<td>3</td>
<td>0</td>
<td>87.5%</td>
</tr>
<tr>
<td>FY15</td>
<td>117</td>
<td>41</td>
<td>35</td>
<td>3</td>
<td>0</td>
<td>92.7%</td>
</tr>
<tr>
<td>FY16</td>
<td>29</td>
<td>13</td>
<td>9</td>
<td>4</td>
<td>0</td>
<td>100%</td>
</tr>
</tbody>
</table>

1st Quarter: 17 10 7 3 0 100%
2nd Quarter: 12 3 2 1 0 100%
3rd Quarter: 22 6 5 1 0 100%
4th Quarter: 22 6

Customers Comments:

PC is very willing to explore options and offer cost effective solutions.

PC is very attentive to detail; PC offers wise professional advice, and is always friendly.
Facilities Management Strategic Planning Session – Third Quarter FY 2016

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
Measure: Percent satisfied or very satisfied on SurveyShare email Survey Results

Lead: Facilities Operations
Balance Scorecard Category: Customer Perspective

Improve Customer Service Satisfaction

<table>
<thead>
<tr>
<th>Question</th>
<th>Satisfied</th>
<th>Dissatisfied</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>How satisfied were you with the time it takes for Fac Ops staff to respond to you issue?</td>
<td>91.84%</td>
<td>8.16%</td>
<td>91.84%</td>
</tr>
<tr>
<td>How satisfied were you with the resolution of your issue or concern?</td>
<td>91.84%</td>
<td>8.16%</td>
<td>91.84%</td>
</tr>
<tr>
<td>Was there follow-up? Yes/No</td>
<td></td>
<td></td>
<td>2.08%</td>
</tr>
<tr>
<td>How satisfied were you with our staff's courteousness and professionalism?</td>
<td></td>
<td></td>
<td>97.92%</td>
</tr>
<tr>
<td>How satisfied were you with your overall experience?</td>
<td>97.92%</td>
<td>2.08%</td>
<td>91.84%</td>
</tr>
</tbody>
</table>

Goal 90% Satisfaction
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 Late Fall 2016, Early Spring 2017
• External Marketing Campaign*: “Creating A Campus of Distinction”
  ➢ Signage This launched in February, 2015, and meetings with BES and FO to be scheduled.
  ➢ Solicit feedback/input from Directors Meetings to be scheduled to discuss potential expansion
• Customer Facing technology Meeting to be held February 9
  ➢ Communication plans and user testing assistance with Campus Map and CRDM Report.

Special Projects:
• Traffic communications committee (joint partnership with U. 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
Facilities Management Strategic Planning Session – Third Quarter FY 2016

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

ACTION PLAN FOR IMPROVEMENT

1. Increase the pool of qualified applicants and ensure a qualified, diverse applicant pool. **As appropriate through June 30, 2016**
2. Timely and efficient processing position management actions. **As appropriate through June 30, 2016**
3. Ensure FM maintains current on budgeted positions. **As appropriate through June 30, 2016**
4. Mandatory Targeted Selection for Supervisors. **Ongoing**
5. Updated Interview Guides. **Ongoing.**
Facilities Management Strategic Planning Session – Third Quarter 2016

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

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

FM New Hire/ Promotion 3rd Quarter FY 2016

New Hires = 8
Promotions = 4
Transfers = 4

FM New Hires / Promotions per Department 3rd Quarter FY 2016
Facilities Management Strategic Planning Session – Third Quarter 2016

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 2016

Target - 80 Calendar Days
Missed by – 51 Days
Facilities Management Strategic Planning Session – Third Quarter 2016

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 2016

Target – 120 Calendar days
Missed by – 103 days
Facilities Management Strategic Planning Session – Third Quarter 2016
GOAL #4  Recruit, Develop and Retain Quality Employees

Objective 4.1:  Recruit a Qualified Workforce in a Timely Fashion

<table>
<thead>
<tr>
<th>Tactic 4.1.2:</th>
<th>Reduce Number of Employees Terminated During Probationary Period to less than 5%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Measure:</td>
<td></td>
</tr>
</tbody>
</table>

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

**ACTION PLAN FOR IMPROVEMENT**

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 - Third Quarter 2016

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 2016

Separations by Department During Probation Exempt (Salaried) FY 2016
Facilities Management Strategic Planning Session – Third Quarter 2016

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 2016 Nonexempt

Turnover Rate:
FY 2016 = .14%
3rd Qtr = .34%

Resignations = 7
Retirement = 1
Terminations = 3
Death = 1
Medical Reasons = 1
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 2016 Exempt
Facilities Management Strategic Planning Session – Third Quarter FY 2016

GOAL #4  Recruit, Develop and Retain Quality Employees

Objective 4.2:  Improve Workforce Development

| Tactic 4.2.1: | Increase Supervisor/Manager Training to 40 hours/year |
| Tactic 4.2.2: | Increase Employee Training to 20 hours/year |

**Lead:** Facilities Business Office

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

---

**ACTION PLAN 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 – Third Quarter 2016

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

Departmental Development

- Attend staff meetings with FO and BES to support L&D needs.
- Identify and source vendors for training delivery;
  - Focusing on areas of: Leadership, Technical, Administrative, Safety
- Communicate upcoming training events to FM employees;
- Review objective metrics with AVC for next FY.

Lending Library Initiative

- Review and update current procedures for use of library materials; expected release of procedures in April 2016.
- Working with FM Communication Officer on marketing/promotional strategy.

NEO Review and Revamp

- Develop and publish a new FM acronym guide for new employees;
  - As of March 31st:
    - Published to FM webpage
    - Included in FM-NEO materials
- Developing new FM NEO format to include Unit Directors and/or designee:
  - AVC briefed
  - Next steps: Proposed changes will be presented to Directors for discussion
Facilities Management Strategic Planning Session – Third Quarter 2016

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 16

Training Hours for Supervisors & Managers by Quarter

FY 2016
Target - 1,960 hrs
3rd Qtr. Target – 490 hrs

Actual YTD
1195.5 hrs (61 %)

Actual 3rd Qtr.
857 hrs (175 %)

ANNUAL
Facilities Management Strategic Planning Session – Third Quarter 2016

GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.2: Improve Workforce Development

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

**Tactic 4.2.2:** Increase Employee Training to **20 hours/year**
**Measure:**
Average Hours of Training completed by front line employees

FY 16

*Training Hours for front line employees by Quarter*

**FY 2016**
Annual Target - 7,760 hrs
3rd Qtr. Target – 1,940 hrs

**Actual YTD**
2,566.5 hrs (33%)

**Actual 3rd Qtr.**
1343.5 hrs (69%)
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.) – **TBD (based upon UI availability)**
- Discuss survey administration feasibility with Urban Institute and obtain potential scheduling timeframes – January 2016;
- Next survey date TBD.
Facilities Management Strategic Planning Session – Third Quarter 2016

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**

<table>
<thead>
<tr>
<th>Action Item</th>
<th>Target Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Efforts to reduce accidents:</td>
<td></td>
</tr>
<tr>
<td>Safety Training Provided FY16 YTD – <strong>881 hours</strong></td>
<td></td>
</tr>
<tr>
<td>• Safety Training Taskforce (Collaborative initiative with EHS)</td>
<td>Ongoing</td>
</tr>
<tr>
<td>• Arc Flash Awareness Training (Grainger, March 2016)</td>
<td></td>
</tr>
<tr>
<td>• Electrical Troubleshooting &amp; Preventive Maintenance</td>
<td>March 2016</td>
</tr>
<tr>
<td>• Electrical Safety (High Voltage &amp; Electricians)</td>
<td>June 2016</td>
</tr>
<tr>
<td>• Initiate Safety related activities</td>
<td></td>
</tr>
<tr>
<td>• FM Safety Committee meeting</td>
<td>Bi-monthly</td>
</tr>
<tr>
<td>• Supervisor Safety Talks (<a href="#">12-month topics posted to website</a>)</td>
<td>Monthly</td>
</tr>
<tr>
<td>• Safety Slogan Contest - “<a href="#">Safety Pays In Many Ways</a>”</td>
<td>July 2016</td>
</tr>
<tr>
<td>• Current Stats for Accident/Incident Totals (FY16)</td>
<td></td>
</tr>
<tr>
<td>• Accidents - 6</td>
<td>2016 FY</td>
</tr>
<tr>
<td>• Minor incidents – 0</td>
<td></td>
</tr>
<tr>
<td>• February &amp; March – Zero Accidents!!</td>
<td></td>
</tr>
</tbody>
</table>
Facilities Management Strategic Planning Session – Third Quarter 2016

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

2016 Continuous Improvement Target ≤ 17

Accidents | First Aid Only
---|---
28 | 4
26 | 2
24 | 0
24 | 1
19 | 5
12 | 7
11 | 1
12 | 2
21 | 6
2015 | 6
2016 YTD | 0

Facilities Management Strategic Planning Session – Third Quarter 2016

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 FOR IMPROVEMENT

<table>
<thead>
<tr>
<th>Action Item</th>
<th>Target Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>FM Academy</td>
<td></td>
</tr>
<tr>
<td>•  Web Content Development, working with NiCole Lynch, FM Communications Officer,</td>
<td>Ongoing</td>
</tr>
<tr>
<td>for updates on Learning &amp; Development webpage.</td>
<td></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>Leadership</td>
<td></td>
</tr>
<tr>
<td>•  Hosting APPA leadership workshops onsite*. Level 1 completed May 2015</td>
<td></td>
</tr>
<tr>
<td>–  *APPA Leadership Academy (Level II)</td>
<td>Feb 2016</td>
</tr>
<tr>
<td>–  *APPA Leadership Academy (Level III)</td>
<td>Mar 2016</td>
</tr>
<tr>
<td>–  *APPA Supervisor Toolkit</td>
<td>June 2016</td>
</tr>
<tr>
<td>–  APPA Leadership Academy (Level IV in FL)</td>
<td>Sept 2016</td>
</tr>
<tr>
<td>–  Updates to FM Leadership Development Matrix</td>
<td>In Process</td>
</tr>
<tr>
<td>Technical</td>
<td></td>
</tr>
<tr>
<td>•  Working with Materials Management on RFP process to secure onsite training providers.</td>
<td></td>
</tr>
<tr>
<td>–  Electrical Troubleshooting &amp; Preventive Maintenance</td>
<td>Mar 2016</td>
</tr>
<tr>
<td>–  Interscope Plus Training (Capital &amp; Design Services)</td>
<td>April 2016</td>
</tr>
<tr>
<td>–  Electrical Safety (High Voltage &amp; Electricians)</td>
<td>June 2016</td>
</tr>
<tr>
<td>–  Investigate Apprenticeship Program</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 – Third Quarter FY 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 |

Balanced Scorecard Category:  Financial Perspective

**ACTIONS PLAN FOR IMPROVEMENT**

**Finance/Budget:**
- FY 16 Call for Divisional one-time funding completed on time; Total FM request $2.8M; Received to date = $1M
- Develop allocation method for training budgets;
- Holding Budget Meetings for BES and FO Departments monthly with director and quarterly with respective leadership teams; Mid-year budget reviews with FO and BES leadership teams scheduled for January 2016;
- Reinstitute capital project budget meetings with Capital team; Meetings began October 2015; Next meetings to be scheduled for January 21, 2016;
- INTERSCOPE training and refreshers provided/completed as needed; additional training provided to Materials Management for quarterly HUB report in October – will be repeated in January 2016;
- Budget Memo and Instructions draft prepared for submission to AVC in late January 2016; Package distribution to be completed during week of January 18th; Training course on how to complete the spreadsheet under consideration.
- **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.

**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 2016; Currently on hold due to absence of Grants Management/Procurement specialist until February 2016;
Facilities Management Strategic Planning Session – Third Quarter FY 2016

GOAL #5  Promote Good Stewardship

Objective 5.1:  Promote Fiscal Responsibility

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

Balanced Scorecard Category: Financial Perspective

ACTION PLAN FOR IMPROVEMENT

Cost Accounting – Ongoing Improvements

• Devise strategy to improve cost accounting measures within all areas of Facilities Management – FY 2016
  – Improve org code usage – July 2015 through June 2016; Three part org code concerns being addressed to include home org, timesheet org and pay/funding org;
    • Funding org underway with several changes made in June 2015; Additional changes are under discussion with Position Control and should be completed by September 2015. Request delayed by Position Management (Budget Office) due to bonus pay requirement and strategic increase initiative; Anticipate completion of submitted changes January 2016;
• Review monthly position control reports to ensure that positions/budgets are appropriately aligned. – 15th of each month;
• Need for an entry-level accountant position for FY 16 to improve and monitor use of account codes across FM; Position will assist in the areas of reporting; monitoring and management; Key component for FBO organizational structure and succession planning, as well;
• APPA Survey – Cost data gathered and reviewed by AVC; Survey completed on time.
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
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

$675,000 24% of Goal Met

$453,000 16% Goal Met

$626,000 22% of Goal Met

$1,072,000 38% Balance to Meet Goal

$2.8M Annual Goal
Facilities Management Strategic Planning Session – Third 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
3rd Quarter FY16

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

STATUS: 3rd Qtr
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
  • Continuing work with HRL to increase recycling rates in residence halls.
  • Continuing training new C&D Coordinator.
  • Planned Spring Campus Cleanup, Tree Planting, and Earth Day.
  • Departmental training - waste audits on our Recycling roll-offs at ReCommunity (February 15 – this resulted in a 50% decrease of our $$/per ton)
  • Increase social media presence – Twitter, Facebook, Instagram – strong effort to post every day (every other day at the least).
  • Well on our way to completing our storage structure for universal waste!!!!

4th Quarter Actions Planned
  • Begin using our universal waste storage building.
  • Continue work on increasing social media presence – Twitter, Facebook, Instagram.
  • Place about 25 recycling bins in housing quads (continue working with HRL to pair up all trash and recycling bins)
  • Increase education component – beginning with HRL and creating signage to place this summer.
  • Continue work on long-term recycling plan.
Facilities Management Strategic Planning Session – Third Quarter FY 2016

**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**

- Diverted: 695 tons (443 tons) in 4th Qtr FY15, 680 tons (265 tons) in 1st Qtr FY16, 298 tons (298 tons) in 2nd Qtr FY16, 276 tons (276 tons) in 3rd Qtr FY16
- Total: 876 tons (28% in 4th Qtr FY08, 51% in 4th Qtr FY15, 39% in 1st Qtr FY16, 34% in 2nd Qtr FY16, 39% in 3rd Qtr FY16)

---

**Annual Solid Waste Comparison**

*Notable increase in 4th quarter due to a Grounds project in May that removed tons of dirt from campus.
Facilities Management Strategic Planning Session – Third Quarter FY 2016

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 16.
Measure: STARS points to achieve silver rating

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

ACTION PLAN

- Assess additional actions for achieving STARS Silver (completed – documentation actions only).
- Uploading information to STARS Website with help from Planning Temp
- Submit for rating by end of fiscal year.
Facilities Management Strategic Planning Session – Third Quarter FY 2016

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 16.
Measure: STARS points to achieve silver rating

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

Percentage of Completion

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Rating</th>
<th>Completion</th>
</tr>
</thead>
<tbody>
<tr>
<td>4th Qtr FY15</td>
<td>92%</td>
<td></td>
</tr>
<tr>
<td>1st Qtr FY16</td>
<td>92%</td>
<td></td>
</tr>
<tr>
<td>2nd Qtr FY16</td>
<td>95%</td>
<td></td>
</tr>
<tr>
<td>3rd Qtr FY16</td>
<td>95%</td>
<td></td>
</tr>
</tbody>
</table>
Facilities Management Strategic Planning Session – Third Quarter FY 2016

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 16.
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 (June STARS Submission)
  2. Faculty Development for Curriculum (May Workshop for Faculty)
  3. Campus as a Laboratory (CGI: $28k for studies underway, supplies)
  4. Outreach Communications (Website development; CGI: $5k for signs)
  5. Design Standards
     - CGI: biking, water, recycling; completed $56k underway
     - CFAT: $64k for car-charging stations, ordered equipment
  6. Standard Operating Procedures (CFAT $15k and CGI $15k for EV monitoring)
  7. Purchasing Practices (Need to start new Task Force)
- Estimated 63% of best practices implemented by (>60% in July 2015; COMPLETED):
  - Continue: In-house certifications (e.g. Green Office)
Facilities Management Strategic Planning Session – Third Quarter FY 2016

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 16.
Measure: Percent of Campus Sustainability Plan best practices implemented

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

Percentage of Completion

<table>
<thead>
<tr>
<th>Best Practices</th>
<th>4th Qtr FY 15</th>
<th>1st Qtr FY 16</th>
<th>2nd Qtr FY 16</th>
<th>3rd Qtr FY 16</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>61%</td>
<td>61%</td>
<td>63%</td>
<td>63%</td>
</tr>
</tbody>
</table>

Status

Lead Facilities Planning
GOAL #5 – Promote Good Stewardship

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

ACTIONS TO REDUCE CAMPUS ENERGY USAGE

• Continue retro-commissioning program
  • Cameron, McEniry, & Smith started
• Exterior Lighting upgrades to LED
  • Street light replacements - Complete
  • 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
Facilities Management Strategic Planning Session – Third Quarter FY 2016

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 35%
System Goal of 40% by 2025
Facilities Management Strategic Planning Session – Third Quarter FY2016

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 21 Gal/GSF

Exceeded Goal in FY10.
No new report
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

- Hosted Construction Meet & Greet March 10, 2016
- Establish project specific participation goals for single prime projects
  - 20% goal for RDH; obtained 46%
- Challenge GCs to obtain 25% or better participation on CMAR projects
- Review GFE documentation for compliance before 1st tier subcontracts are awarded on CMAR projects
- Work with internal/external groups to identify skilled HUB contractors
- Work with GA/SCO/DOA to ensure HUB information is accurately reflected in InterscopePlus
- Work with SCO to revise new Prequalification Policy
GOAL #5 – Promote Good Stewardship

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

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

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

Lead:  Capital Projects

Balanced Scorecard Category:  Financial Perspective

HUB Participation
Capital Projects > $500,000

80% GOAL
GOAL #5 – Promote Good Stewardship

Objective: 5.4: Improve Historically Underutilized Businesses (HUB) Participation
Tactic 5.4.2: 5% African American Participation on Capital Projects
Measure: Total Capital Dollars awarded to African American Contractors divided by Total Contract Dollars
Lead: Capital Projects
Balanced Scorecard Category: Financial Perspective
Facilities Management Strategic Planning Session – Third Quarter FY2016

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

<table>
<thead>
<tr>
<th></th>
<th>FY 2015</th>
<th>1stQtr16</th>
<th>2ndQtr16</th>
<th>3rdQtr16</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status</td>
<td>52%</td>
<td>100%</td>
<td>96%</td>
<td>100%</td>
</tr>
<tr>
<td>GOAL</td>
<td>15%</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
</tr>
</tbody>
</table>

15% GOAL

Status Bar Chart:
- Total Informal Project Dollars
- Informal Project Dollars w/HUB Firms
Facilities Management Strategic Planning Session – Third Quarter FY 2016

GOAL #5 – Promote Good Stewardship

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

Lead: Design Services

Balanced Scorecard Category: Financial

| 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

NEW IMPROVEMENTS

• Ben Amanda Caudle schedules initial meetings with African American Contractors

  Recent Meetings with African American Contractors:
  
  ◊ KID Construction Co. – General Contractors – Kevin Burns
  ◊ Benet Electrical – Electrical Contractor – Marvin B. Tyler
  ◊ MORCON QUALITY CONSTRUCTION – Myron Ross

• Benet Electrical has been recently used by David Daignault

ONGOING IMPROVEMENTS

➢ Design Team continue to review and discuss HUB contractors and vendors at our Design Services weekly meetings.

➢ All Coordinators are encouraged to reach out to new vendors for work on our Under $30K projects.
Facilities Management Strategic Planning Session – Third Quarter FY 2016

GOAL #5 – Promote Good Stewardship

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

Lead: Design Services

Balanced Scorecard Category: Financial

Tactic 5.4.4: 13% overall HUB participation on informal projects below $30,000 including 3% African American

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

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

<table>
<thead>
<tr>
<th>QUARTERLY REVIEW</th>
<th>Value of Contracts under 30K</th>
<th>H.U.B. Contribution</th>
<th>HUB Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>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>
</tbody>
</table>

| Q 1              | $455,156                    | $166,732            | 36.6%     |
| Q 2              | $472,858                    | $197,068            | 41.7%     |
| Q 3              | $643,677                    | $388,769            | 60.4%     |
| Q 4              | -                           | -                   | 0.0%      |

FY '16 STATUS: $1,571,691 $752,569 47.9%

13% Overall HUB Participation – Summary Graph
Facilities Management Strategic Planning Session – Third Quarter FY 2016

GOAL #5 – Promote Good Stewardship

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

Lead: Design Services

Balanced Scorecard Category: Financial

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

<table>
<thead>
<tr>
<th>QUARTERLY REVIEW</th>
<th>Value of Contracts under 30K</th>
<th>African Am. Contribution</th>
<th>African Am. Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY09</td>
<td>$ 996,756</td>
<td>$ 40,894</td>
<td>4.1%</td>
</tr>
<tr>
<td>FY10</td>
<td>$ 1,452,202</td>
<td>$ 73,987</td>
<td>5.1%</td>
</tr>
<tr>
<td>FY11</td>
<td>$ 3,924,102</td>
<td>$ 77,377</td>
<td>2.0%</td>
</tr>
<tr>
<td>FY12</td>
<td>$ 2,878,027</td>
<td>$ 46,475</td>
<td>1.6%</td>
</tr>
<tr>
<td>FY13</td>
<td>$ 2,891,003</td>
<td>$ 115,219</td>
<td>4.0%</td>
</tr>
<tr>
<td>FY14</td>
<td>$ 1,863,533</td>
<td>$ 103,513</td>
<td>5.6%</td>
</tr>
<tr>
<td>FY15</td>
<td>$ 2,655,882</td>
<td>$ 46,795</td>
<td>1.8%</td>
</tr>
<tr>
<td>Q 1</td>
<td>$ 455,156</td>
<td>$ 1,250</td>
<td>0.3%</td>
</tr>
<tr>
<td>Q 2</td>
<td>$ 472,858</td>
<td>$ 29,820</td>
<td>6.3%</td>
</tr>
<tr>
<td>Q 3</td>
<td>$0.00</td>
<td>$0.00</td>
<td>0.0%</td>
</tr>
<tr>
<td>Q 4</td>
<td>-</td>
<td>$ -</td>
<td>0.0%</td>
</tr>
<tr>
<td>FY16 STATUS</td>
<td>$ 928,014</td>
<td>$ 31,070</td>
<td>3.3%</td>
</tr>
</tbody>
</table>

3% African American Participation – Summary Graph

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

Current Status 3.3%
Annual Goal 3.0%
QTR 3 Status 0.0%
Lead - Design Services

GOAL
ALERT