Strategic Planning Session

Fourth Quarter – Fiscal Year 2013
April – June 2013

...Creating a Campus of Distinction
GOAL #1

Improve Maintenance and Operation on the Campus

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

-- Harold Geneen, industrialist
GOAL #2

Successfully Adapt Existing Facilities to Meet New Requirements

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

-- Earl Nightingale, Motivational Speaker
GOAL #3

Deliver New Facilities that Support the University’s Mission

"Fix your eyes forward on what you can do, not back on what you cannot change."

—Tom Clancy
GOAL #4

Perfect 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
GOAL #5

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

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

-- Calvin Coolidge, 30th U.S. president
GOAL #6

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
Balance Score Card

CUSTOMER Perspective

Strategic Objectives:

- Work Request Process
- Housekeeping Processes
- Improve Process Reliability
- Increase On-Time Delivery
- Informal Project Administration
- Enhance Customer Satisfaction
## GOAL #1 – Improve Facilities Operations

<table>
<thead>
<tr>
<th>Strategy:</th>
<th>1.3</th>
<th>Improve Work Request Process</th>
</tr>
</thead>
<tbody>
<tr>
<td>Objective:</td>
<td>1.3.1</td>
<td>Decrease Percentage of Reactive Work Requests to &lt; 58%</td>
</tr>
<tr>
<td></td>
<td>1.3.2</td>
<td>Decrease Work Request Cycle Time by 5% (300 hours)</td>
</tr>
</tbody>
</table>

### ACTION PLAN

- **Actions Planned**

  1. Old and New PM Modules are not connecting so the data is not a true count; data shown is not accurate.
  2. 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.

### Lead F. O.
Facilities Management Strategic Planning Session – Fourth Quarter FY 2013

GOAL #1 – Improve maintenance and operations of the Campus

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

Measure: Percentage (Number of reactive work requests divided by total number of work requests including PM and predictive work requests) (APPA Benchmark)
Goal: Percentage to < 58% average for the year.

Balanced Scorecard Category: Customer Perspective
Facilities Management Strategic Planning Session – Fourth Quarter FY 2013

GOAL #1 – Improve maintenance and operations of the Campus

Strategy: 1.3 Improve Work Request Process
Objective: 1.3.2 Decrease Work Request Cycle Time by 5% (< 300 quarterly)

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

Goal: Less than 300 quarterly average for the year

Balanced Scorecard Category: Customer Perspective

![Graph showing the improvement in Work Request Process for WR's not requiring parts over the quarters of FY13. The goal is to keep the cycle time below 300 hours per quarter for the year. The average for the year-to-date is shown.]
GOAL #1 – Improve Maintenance and Operations

Strategy: 1.4 Improve Housekeeping Processes
Objective: 1.4.1 Achieve APPA Level 2 in 98% of Buildings

**ACTION PLAN**

- **Actions Complete**
  - All buildings not in renovation audited (self audit)
  - Changed chart to reflect summary data for last four quarters
  - Hired Program Development and Education Coordinator

- **Actions Planned**
  - Continue quarterly self audits
  - CIMS Certification/Green Cleaning Project (feasibility review)
Facilities Management Strategic Planning Session – 4th Quarter FY 2013

GOAL #1 – Improve Maintenance and Operations of the Campus

Strategy: 1.4 Improve Housekeeping Processes
Objective: 1.4.1 Achieve APPA Level 2 in 98% of Buildings

Measure: Percentage of buildings meeting APPA Level 2 cleanliness standards during quarterly inspection (APPA Benchmark)

Balanced Scorecard Category: Internal Business Process

APPA LEVELS

4th QTR 95%
YTD 93.5%
GOAL #1 – Improve Facilities Operations

Strategy: 1.5 Improve Reliability
Objective: 1.5.3 Reduce Unscheduled High Voltage Electrical System Outages by 0.0069
1.5.4 Reduce Unscheduled Fire Alarm Network Outages by 10%

ACTION PLAN

• Actions Planned
  ▪ Review system projects identified on the R&R list and prioritize. Indicate urgency and recommend future funding dates.
  ▪ Continue working with Simplex/Siemens to bring the new buildings online with the network.
Facilities Management Strategic Planning Session – Fourth Quarter FY 2013

GOAL #1 – Improve maintenance and operations of the Campus

Strategy: 1.5 Improve Reliability
Objective: 1.5.3 Reduce Unscheduled High Voltage Electrical System Outages by .69%

Measure: Percentage of time system is fully operational (Hours of Outage divided by Total Hours in Quarter)

Goal: Less than .69% for year.

Balanced Scorecard Category: Customer Perspective
Facilities Management Strategic Planning Session – Fourth Quarter FY 2013

GOAL #1 – Improve maintenance and operations of the Campus

Strategy: 1.5 Improve Reliability
Objective: 1.5.4 Reduce Unscheduled Fire Alarm Network Outages by 10%

Measure: Percentage of time system is fully operational (Hours of Outage divided by Total Hours in Quarter)

Goal: Less than 10%

Balanced Scorecard Category: Customer Perspective
GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

Strategy    2.2    Improve Informal Project Design and Construction Process

| Objective | 2.2.1 | 95% of Projects Designed on Time | **97.0% achieved for FY12** with 94.0% in the 4th Quarter |
| Objective | 2.2.2 | 85% of Estimates for in house construction within +/- 10% of Actual | **97.2% achieved for FY12** with 96.6% in the 4th Quarter |
| Objective | 2.2.4 | 90% of All Construction Projects Meet Scheduled Beneficial Occupancy Date | **95.9% achieved for FY12** with 94.4% in the 4th Quarter |

Objective 2.2.6  Increase Project Volume by 10 projects per year - Project Counts by Phase
100% achieved for FY12  -  (yearly goal only)

**ACTION PLANS FOR IMPROVEMENT**

- **Implement process updates based on four committee recommendations identified 1st Quarter FY-13:**
  1. Streamline Processes
  2. Under $30K Contracts
  3. Develop new Customer Survey
  4. Increase African American HUB usage

- **Continue efforts with assigning Classroom Capacity and providing egress information per individual buildings:** Ongoing – driven by building and project needs.

**IMPLEMENTED ACTIONS AND PLANS**

- Project schedules from Scope & Budget phase through Design, Construction and Closeout. **Ongoing.**
- 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 – Fourth Quarter FY 2013

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

**Strategy** 2.2  
**Objective** 2.2.1  
**Measure:** Percentage (Number of Project Designs completed on or before scheduled delivery date divided by total number of projects designed)

**Balanced Scorecard Category:** Customer Perspective

### QUARTERLY REVIEW

<table>
<thead>
<tr>
<th>QUARTER</th>
<th>No. Of Projects Designed</th>
<th>Project Design Completed by Delivery Date</th>
<th>Project Design Not completed on time</th>
<th>Designed On Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY '10</td>
<td>173</td>
<td>170</td>
<td>3</td>
<td>98.3%</td>
</tr>
<tr>
<td>FY '11</td>
<td>300</td>
<td>275</td>
<td>25</td>
<td>91.7%</td>
</tr>
<tr>
<td>FY '12</td>
<td>240</td>
<td>228</td>
<td>12</td>
<td>95.0%</td>
</tr>
<tr>
<td>QTR 1</td>
<td>29</td>
<td>29</td>
<td>0</td>
<td>100.0%</td>
</tr>
<tr>
<td>QTR 2</td>
<td>38</td>
<td>37</td>
<td>1</td>
<td>97.4%</td>
</tr>
<tr>
<td>QTR 3</td>
<td>42</td>
<td>40</td>
<td>2</td>
<td>95.2%</td>
</tr>
<tr>
<td>QTR 4</td>
<td>30</td>
<td>29</td>
<td>1</td>
<td>96.7%</td>
</tr>
</tbody>
</table>

**FY '13 STATUS**  
- 139 Projects Designed
- 135 Project Designs Completed on Time
- 4 Projects Design Not completed on time
- 97.1% Designed On Time
Facilities Management Strategic Planning Session – Fourth Quarter FY 2013

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

<table>
<thead>
<tr>
<th>Strategy</th>
<th>2.2</th>
<th>Improve Informal Project Design and Construction Process</th>
</tr>
</thead>
<tbody>
<tr>
<td>Objective</td>
<td>2.2.2</td>
<td>85% of Estimates for All Construction within +/- 10% of Actual.</td>
</tr>
</tbody>
</table>

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

Balanced Scorecard Category: Customer Perspective

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

<table>
<thead>
<tr>
<th>QUARTERLY REVIEW</th>
<th>No. Of Projects Estimated</th>
<th>Projects Estimated within +/- 10%</th>
<th>Projects Not Estimated within +/- 10%</th>
<th>Estimates within +/- 10%</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY’10</td>
<td>182</td>
<td>155</td>
<td>27</td>
<td>85.2%</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>224</td>
<td>16</td>
<td>93.3%</td>
</tr>
<tr>
<td>QTR 1</td>
<td>32</td>
<td>32</td>
<td>0</td>
<td>100.0%</td>
</tr>
<tr>
<td>QTR 2</td>
<td>30</td>
<td>29</td>
<td>1</td>
<td>96.7%</td>
</tr>
<tr>
<td>QTR 3</td>
<td>44</td>
<td>42</td>
<td>2</td>
<td>95.5%</td>
</tr>
<tr>
<td>QTR 4</td>
<td>33</td>
<td>32</td>
<td>1</td>
<td>97.0%</td>
</tr>
</tbody>
</table>

FY ’13 STATUS 139 135 4 97.1%
Facilities Management Strategic Planning Session – Fourth Quarter FY 2013

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

<table>
<thead>
<tr>
<th>Strategy</th>
<th>2.2</th>
<th>Improve Informal Project Design and Construction Process</th>
</tr>
</thead>
<tbody>
<tr>
<td>Objective</td>
<td>2.2.4</td>
<td>90% of All Construction Projects Meet Scheduled Beneficial Occupancy Date (BOD)</td>
</tr>
</tbody>
</table>

Measure: Percentage (Number of In-House projects completed on or before delivery date divided by total number of projects completed)

Balanced Scorecard Category: Customer Perspective

### QUARTERLY REVIEW

<table>
<thead>
<tr>
<th>QUARTERLY REVIEW</th>
<th>No. of Projects</th>
<th>No. that met Beneficial Occupancy</th>
<th>No. that did not meet Delivery Date</th>
<th>Completed On Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY’10</td>
<td>182</td>
<td>164</td>
<td>18</td>
<td>90.1%</td>
</tr>
<tr>
<td>FY’11</td>
<td>297</td>
<td>289</td>
<td>8</td>
<td>97.3%</td>
</tr>
<tr>
<td>FY’12</td>
<td>240</td>
<td>216</td>
<td>24</td>
<td>90.0%</td>
</tr>
<tr>
<td>QTR 1</td>
<td>32</td>
<td>30</td>
<td>2</td>
<td>93.8%</td>
</tr>
<tr>
<td>QTR 2</td>
<td>45</td>
<td>41</td>
<td>4</td>
<td>91.1%</td>
</tr>
<tr>
<td>QTR 3</td>
<td>44</td>
<td>42</td>
<td>2</td>
<td>95.5%</td>
</tr>
<tr>
<td>QTR 4</td>
<td>18</td>
<td>17</td>
<td>1</td>
<td>94.4%</td>
</tr>
<tr>
<td>FY ’13 STATUS</td>
<td>139</td>
<td>130</td>
<td>9</td>
<td>93.5%</td>
</tr>
</tbody>
</table>

FY ’10 FY ’11 FY ’12 QTR 1 QTR 2 QTR 3 QTR 4 FY ’13 STATUS

GOAL 90.0% STATUS 93.5%

90% of All Projects Meet Scheduled Beneficial Occupancy Date (BOD) - 2.2.4
Facilities Management Strategic Planning Session – Fourth Quarter FY 2013

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

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

Measure: The 2008 Benchmark is 200 projects.

Balanced Scorecard Category: Customer Perspective

Increase Project Volume by 10 Projects per year

<table>
<thead>
<tr>
<th></th>
<th></th>
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<tbody>
<tr>
<td></td>
<td>150</td>
<td>160</td>
<td>170</td>
<td>180</td>
<td>190</td>
<td>200</td>
<td>210</td>
<td>220</td>
<td>230</td>
<td>240</td>
<td>250</td>
</tr>
</tbody>
</table>

Projects Completed


136 161 173 194 205 190 115 182 224 240 139

Project Dollars

$2,060,000 $2,609,000 $3,450,000 $8,480,000 $8,875,000 $8,200,000 $7,477,000 $9,111,286 $9,869,281 $19,393,759 $8,393,106

AVG$/Project

$15,147 $16,205 $19,942 $43,711 $43,293 $43,158 $65,017 $50,062 $44,059 $80,807

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

Strategy 3.4    Improve Administration of the Capital Construction Process
Objective 3.4.1 90% of Capital Construction Projects completed on Schedule

ACTION PLAN

• Actions Planned
  1. Keep schedules current & refer to them monthly
  2. Discuss schedule (baseline & current) with end users
  3. Inform designer and CM of each other’s contractual agreements
Facilities Management Strategic Planning Session – Fourth Quarter FY 2013

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

Strategy 3.4 Improve Administration of the Capital Construction Process
Objective 3.4.1 90% of capital construction projects completed on time

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

Balanced Scorecard Category: Customer

<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-10</td>
<td>6</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>Summary FY-11</td>
<td>7</td>
<td>1</td>
<td>88%</td>
</tr>
<tr>
<td>Summary FY-12</td>
<td>6</td>
<td>6</td>
<td>50%</td>
</tr>
<tr>
<td>Summary FY-13</td>
<td>1</td>
<td>2</td>
<td>33%</td>
</tr>
<tr>
<td>1st Qtr. FY-13</td>
<td>1</td>
<td>1</td>
<td>50%</td>
</tr>
<tr>
<td>2nd Qtr. FY-13</td>
<td>0</td>
<td>1</td>
<td>0%</td>
</tr>
<tr>
<td>3rd Qtr. FY-13</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>4th Qtr. FY-13</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
</tbody>
</table>

4th Qtr. Objective is n/a
Year to date is 33%

Goal 90%
GOAL #4 – Perfect a Customer Focused Organization

Strategy 4.1 Continually Improve Customer Service/Satisfaction

Objective 4.1.1 Achieve Overall FM Customer Satisfaction of 85%

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

ACTION PLAN

- Website W.I.G. - Continue development of new web pages for Safety, Training, and Customer Information for both internal and external customers.

- Development of a Communications Strategy recommendation underway.
  - Web Advisory Group (WAG) has been formed to address customer usability, design and university compliance of FM entire website.
  - Continual customer, community and UNC system education of services (e.g. Customer Handbook, Sustainability Report). Environmental scans to continue, ensuring needs and issues are addressed.
  - Increased external publicity (i.e. UNC Charlotte Magazine, Observer)
  - Research and visitations of other peer institution Communication Offices for learning opportunities, processes, challenges, pitfalls, etc.

- Review processes and procedures from the Business and HR side
  - Review (lean) Time Sheet Processing. Processes have been mapped. Project on hold due to new university initiative?
GOAL #4 – Perfect a Customer Focused Organization

Strategy 4.1 Continually improve customer service/satisfaction

Objective 4.1.4 90% of Informal Project Customers Satisfied or Very Satisfied

ACTION PLAN FOR IMPROVEMENT

• Currently Customers are reluctant to respond to the Archibus questionnaire due to its length and requested level of detail.

• **Work are revising the questionnaire as currently sent to our Customers and will deliver and receive questionnaire outside of Archibus** - **We would like this to be accomplished within the next 90 days.**

• We are working to find ways to encourage much more Customer participation.
Facilities Management Strategic Planning Session – Fourth Quarter FY 2013

GOAL #4 – Perfect a Customer Focused Organization

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

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

Balanced Scorecard Category: Customer Perspective

<table>
<thead>
<tr>
<th>QUARTERLY SURVEY</th>
<th>Number of Projects Surveyed</th>
<th>Very Satisfied 5</th>
<th>Satisfied 4+</th>
<th>Somewhat Satisfied 3+</th>
<th>Neutral 2+</th>
<th>Somewhat Dissatisfied 1+</th>
<th>Unsatisfied 0+</th>
<th>Percent Satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY '09</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.0%</td>
</tr>
<tr>
<td>FY '10</td>
<td>30</td>
<td>18</td>
<td>5</td>
<td>6</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>76.7%</td>
</tr>
<tr>
<td>FY '11</td>
<td>33</td>
<td>24</td>
<td>6</td>
<td>2</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>90.9%</td>
</tr>
<tr>
<td>QTR 1</td>
<td>1</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>100.0%</td>
</tr>
<tr>
<td>QTR 2</td>
<td>4</td>
<td>2</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>75.0%</td>
</tr>
<tr>
<td>QTR 3</td>
<td>4</td>
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<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
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<td>QTR 4</td>
<td>14</td>
<td>11</td>
<td>2</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>92.9%</td>
</tr>
</tbody>
</table>

FY '13 STATUS 23 18 3 0 1 1 1 0 91.3%

GOAL: 90.0%

This survey document is no longer viable. New document under development for review FY-14 second quarter.
GOAL #4 – Perfect a Customer Focused Organization

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

ACTION PLAN

• Actions Planned

  1 – Stay abreast of ESCO contract and ensure comfort is not sacrificed for energy.
  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 UNCC Temperature Control Policy
Facilities Management Strategic Planning Session – Fourth Quarter FY 2013

GOAL #4 – Perfect a Customer Focused Organization

Strategy 4.1   Continually Improve Customer Service/Satisfaction
Objective 4.1.3 Decrease the Number of Hot/Cold Calls by 10% (Goal < 133)

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

Goal: Less than 133 per quarter

Balanced Scorecard Category: Customer Perspective
<table>
<thead>
<tr>
<th>Perspective</th>
<th>Strategic Objective</th>
<th>Goal</th>
<th>Lag Measures/Lead Measures</th>
<th>Target</th>
<th>Actual</th>
<th>1st Quarter</th>
<th>2nd Quarter</th>
<th>3rd Quarter</th>
<th>4th Quarter</th>
<th>YTD</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Customer</strong></td>
<td>To achieve our vision, how must we view &amp; treat our customers?</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Work Request Process</td>
<td>1.3.1</td>
<td>Reactive Maintenance work requests</td>
<td>&lt;58%</td>
<td>55.50%</td>
<td>55.50%</td>
<td>55.50%</td>
<td>55.50%</td>
<td>55.50%</td>
<td>55.50%</td>
<td>58.95%</td>
</tr>
<tr>
<td></td>
<td>1.3.2</td>
<td>Decrease Work Request Cycle Time by 5%</td>
<td>&lt;300 hrs</td>
<td>102</td>
<td>102</td>
<td>102</td>
<td>102</td>
<td>102</td>
<td>203</td>
<td>203</td>
</tr>
<tr>
<td>Housekeeping Processes</td>
<td>1.4.1</td>
<td>Achieve APPA Level 2 in 98% of Buildings</td>
<td>98%</td>
<td>95%</td>
<td>95%</td>
<td>95%</td>
<td>95%</td>
<td>95%</td>
<td>93.5%</td>
<td>93.5%</td>
</tr>
<tr>
<td>Improve Process Reliability</td>
<td>1.5.3</td>
<td>Reduce Unscheduled HV outages by 10%</td>
<td>&lt;=0.0069</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td></td>
<td>1.5.4</td>
<td>Reduce Unscheduled FA Network Outages by 10%</td>
<td>&lt;10%</td>
<td>0.00%</td>
<td>0.00%</td>
<td>0.00%</td>
<td>0.00%</td>
<td>0.00%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Increase on-time delivery</td>
<td>2.2.1</td>
<td>95% of Projects Designed on Time</td>
<td>95%</td>
<td>96.7%</td>
<td>96.7%</td>
<td>96.7%</td>
<td>96.7%</td>
<td>96.7%</td>
<td>97%</td>
<td>97%</td>
</tr>
<tr>
<td>Informal Project Administration</td>
<td>2.2.2</td>
<td>85% of Estimates for All Construction within +/- 10%</td>
<td>85% w/in 10% actuals</td>
<td>97.0%</td>
<td>97.0%</td>
<td>97.0%</td>
<td>97.0%</td>
<td>97.0%</td>
<td>97.1%</td>
<td>97.1%</td>
</tr>
<tr>
<td></td>
<td>2.2.3</td>
<td>Combined with 2.2.2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>2.2.4</td>
<td>All IP construction meets BOD</td>
<td>90%</td>
<td>94.4%</td>
<td>94.4%</td>
<td>94.4%</td>
<td>94.4%</td>
<td>94.4%</td>
<td>94.4%</td>
<td>94.4%</td>
</tr>
<tr>
<td></td>
<td>2.2.5</td>
<td>Combined with 2.2.4</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>2.2.6</td>
<td>Increase Project Volume by 10 proj/year</td>
<td>200 = bchmk; goal 250</td>
<td>55.6%</td>
<td>55.6%</td>
<td>55.6%</td>
<td>55.6%</td>
<td>55.6%</td>
<td>139</td>
<td>139</td>
</tr>
<tr>
<td>Enhance customer satisfaction</td>
<td>4.1.1</td>
<td>Improve: Overall satisfaction rating</td>
<td>85%</td>
<td>no data</td>
<td>no data</td>
<td>no data</td>
<td>no data</td>
<td>no data</td>
<td>no data</td>
<td>3%</td>
</tr>
<tr>
<td></td>
<td>4.1.2</td>
<td>All FM Units Achieve Customer Satisfaction of 85%</td>
<td>85%</td>
<td>no survey in FY 2013</td>
<td>no survey in FY 2013</td>
<td>no survey in FY 2013</td>
<td>no survey in FY 2013</td>
<td>no survey in FY 2013</td>
<td>no survey in FY 2013</td>
<td>no survey in FY 2013</td>
</tr>
<tr>
<td></td>
<td>4.1.3</td>
<td>Reduce: Maintenance &amp; Ops # hot/cold calls</td>
<td>-10% or &lt;133</td>
<td>165</td>
<td>165</td>
<td>165</td>
<td>165</td>
<td>165</td>
<td>154</td>
<td>154</td>
</tr>
<tr>
<td></td>
<td>4.1.4</td>
<td>Improve: Informal Projects rating (sat./very sat.)</td>
<td>90%</td>
<td>92.9%</td>
<td>92.9%</td>
<td>92.9%</td>
<td>92.9%</td>
<td>92.9%</td>
<td>92.9%</td>
<td>93.5%</td>
</tr>
</tbody>
</table>
Balance Score Card

FINANCIAL Perspective

Strategic Objectives:
Manage Budget, Maximize Revenue Stream
Promote Fiscal Responsibility
Sustainable Practices
Conserve Natural Resources
Improve Employee Safety
Improve HUB Participation
GOAL #6 – Promote Good Stewardship

Strategy 6.1  Promote Fiscal Responsibility

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

Objective 6.1.2  Increase Grants and Supplemental Funding to the Department by 25%

Objective 6.1.3  Lower Administrative Cost/GSF to +/-5% of the APPA Average for Peer Institutions

CONTINUOUS IMPROVEMENT ACTION PLAN

- FM completed FY 2013 with all funds in the black.
- Expenditures for state appropriated funds were as follows:
  - Emergency Reserve = 99.2% expended
  - Main Operations = 95.8% expended
  - One-Time Funds = 99.6% expended

- The Labor Services fund continues to experience instability in its fund balance. The Business Office will work with FO to identify issues; Request for a cost accounting intern to assist with this and other projects is being considered.

- Development of a FM Budgeting Basics Training program is underway; It is expected that there will be several sections, each targeted to specific areas, actions, etc. Sherry Ceallaigh (Capital Projects) will assist the Business Office by creating the section for Capital Finance. This program will be geared to FM leadership.

- Continue to work through accounting issues such as use of account codes, receiving, after the fact vs. non-compliant requisitions, etc. Send reminders to responsible parties. Review cost accounting centers in preparation for future reporting requirements.

- Boost effort to locate external funding opportunities that align with FM’s strategic vision, mission and goals;
Facilities Management Strategic Planning Session – 4th Quarter FY 2013

GOAL #6 – Promote Good Stewardship

Strategy 6.1 Promote Fiscal Responsibility
Objective 6.1.1 Effectively tracking and monitoring expenditures to ensure funds/accounts are not overexpend at the end of each month.

Measure: Main Operating Fund Variance Report

Balanced Scorecard Category: Financial Perspective

---

### FACILITIES MANAGEMENT OPERATIONS: June 30, 2013

<table>
<thead>
<tr>
<th>ACCOUNT DESCRIPTION</th>
<th>2012-13 Budget</th>
<th>% of TOTAL BUDGET</th>
<th>YTD ACTIVITY</th>
<th>ENCUMBRANCES</th>
<th>TOTAL EXPENDITURES</th>
<th>REMAINING BALANCE</th>
</tr>
</thead>
<tbody>
<tr>
<td>OVERTIME AND PREMIUM PAY</td>
<td>$308,912</td>
<td>8%</td>
<td>$308,912</td>
<td>0</td>
<td>$308,912</td>
<td>$-</td>
</tr>
<tr>
<td>STUDENT AND TEMPORARY WAGES</td>
<td>$53,395</td>
<td>1%</td>
<td>$53,395</td>
<td>$-</td>
<td>$53,395</td>
<td>$-</td>
</tr>
<tr>
<td>PERSONAL SERVICE CONTRACTS</td>
<td>$44,432</td>
<td>1%</td>
<td>$44,432</td>
<td>$-</td>
<td>$44,432</td>
<td>$-</td>
</tr>
<tr>
<td>CORPORATE SERVICES CONTRACTS (Srv Agr)</td>
<td>$759,199</td>
<td>19%</td>
<td>$756,922</td>
<td>2,277</td>
<td>$759,199</td>
<td>$-</td>
</tr>
<tr>
<td>OTHER ADMINISTRATIVE EXPENSES</td>
<td>$52,604</td>
<td>1%</td>
<td>$43,404</td>
<td>9,200</td>
<td>$52,604</td>
<td>$-</td>
</tr>
<tr>
<td>DOMESTIC TRAVEL/TRAINING</td>
<td>$131,631</td>
<td>3%</td>
<td>$131,631</td>
<td>$-</td>
<td>$131,631</td>
<td>$-</td>
</tr>
<tr>
<td>FIXED PURCHASED SERVICES (Maint Agr)</td>
<td>$241,001</td>
<td>6%</td>
<td>$241,001</td>
<td>$-</td>
<td>$241,001</td>
<td>$-</td>
</tr>
<tr>
<td>OTHER PURCHASED SERVICES</td>
<td>$472,629</td>
<td>12%</td>
<td>$344,495</td>
<td>128,134</td>
<td>$472,629</td>
<td>$-</td>
</tr>
<tr>
<td>SUPPLIES</td>
<td>$1,575,222</td>
<td>39%</td>
<td>$1,555,587</td>
<td>15,612</td>
<td>$1,571,209</td>
<td>$4,013</td>
</tr>
<tr>
<td>EQUIPMENT/IT</td>
<td>$317,274</td>
<td>8%</td>
<td>$306,146</td>
<td>$-</td>
<td>$306,146</td>
<td>$11,129</td>
</tr>
<tr>
<td>CAPITAL OUTLAY</td>
<td>$5,463</td>
<td>0%</td>
<td>$5,463</td>
<td>$-</td>
<td>$5,463</td>
<td>$-</td>
</tr>
<tr>
<td>FIXED CHARGES</td>
<td>$30,829</td>
<td>1%</td>
<td>$30,829</td>
<td>$-</td>
<td>$30,829</td>
<td>$-</td>
</tr>
<tr>
<td>RECYCLING</td>
<td>$39,602</td>
<td>1%</td>
<td>$39,602</td>
<td>$-</td>
<td>$39,602</td>
<td>$-</td>
</tr>
</tbody>
</table>

**FACILITIES MANAGEMENT Main Operating Funds**

| 4,032,194 | 3,861,829.35 | 155,222.41 | 4,017,051.76 | 15,142.05 |
Facilities Management Strategic Planning Session – 4th Quarter FY 2013

GOAL #6 – Promote Good Stewardship

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

Measure: Total dollar amount of grants and supplemental funding

Balanced Scorecard Category: Financial Perspective
Facilities Management Strategic Planning Session – 4th Quarter FY 2013

GOAL #6 – Promote Good Stewardship

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

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

Balanced Scorecard Category: Financial Perspective

Administrative Total Cost per GSF

<table>
<thead>
<tr>
<th>Institution</th>
<th>Administrative Total Cost per GSF</th>
</tr>
</thead>
<tbody>
<tr>
<td>East Carolina University</td>
<td>0.5</td>
</tr>
<tr>
<td>Portland State University</td>
<td>0.5</td>
</tr>
<tr>
<td>University of New Mexico</td>
<td>0.4</td>
</tr>
<tr>
<td>University of North Carolina at Charlotte</td>
<td>0.4</td>
</tr>
<tr>
<td>University of Texas San Antonio</td>
<td>0.5</td>
</tr>
<tr>
<td>SRAPPA Region</td>
<td>0.4</td>
</tr>
</tbody>
</table>
GOAL #6 – Promote Good Stewardship

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

**ACTION PLAN**

- **Actions Planned**
  - Monitor and report custodial cost/student FTE on an annual basis using data from APPA survey
  - Supply chain management project (feasibility review)
Facilities Management Strategic Planning Session – 4th Quarter FY 2013

GOAL #6 – Promote Good Stewardship

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

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

Balanced Scorecard Category: Financial Perspective

STATUS

Avg. cost/student = $338.35
UNCC = 37% below average

$355.26 plus 5% of avg.
$321.43 minus 5% of avg.
GOAL #6 – Promote Good Stewardship

**Strategy 6.1**  
Promote Fiscal Responsibility

**Objective 6.1.5**  
Achieve Total Maintenance Cost/GSF to 5% below the APPA Southeast Region Average

**Objective 6.1.6**  
Achieve Total Landscape Cost/Acre 5% below the APPA Southeast Region Average

**Objective 6.1.7**  
Exceed Labor Services Payroll requirements by 10%

**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 – Utilize UPA to help identify when falling behind in data entry
Facilities Management Strategic Planning Session – Fourth Quarter FY 2013

GOAL #6 – Promote Good Stewardship

Strategy 6.1 Promote Fiscal Responsibility

Objective 6.1.5 Achieve Total Maintenance Cost/GSF ± 5% of APPA Average for Peer Group.

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

Balanced Scorecard Category: Financial Perspective

Note: Peer average does not include institutions not reporting nor those which included auxiliaries (Western Michigan).
Facilities Management Strategic Planning Session – Fourth Quarter FY 2013

GOAL #6 – Promote Good Stewardship

Strategy 6.1  Promote Fiscal Responsibility
Objective 6.1.6  Achieve Total Landscape Cost/Acre ± 5% of APPA Average for Peer Group.

Measure: Landscape cost/Acre from annual APPA Facilities Performance Indicators Report (APPA Benchmark)

Balanced Scorecard Category: Financial Perspective
Facilities Management Strategic Planning Session – Fourth Quarter FY 2013

GOAL #6 – Promote Good Stewardship

Strategy
Promote Fiscal Responsibility

Objective
6.1.7 Exceed Labor Services Payroll requirements by 10%

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

Goal:
$400,000.00/Qtr

Balanced Scorecard Category: Financial Perspective

Quarterly Reimbursable Labor $
GOAL #6 – Promote Good Stewardship

Strategy 6.2  Develop a Sustainable Campus
Objective 6.2.1  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: Financial Perspective

Capital Projects Diversion
4th Quarter FY13

<table>
<thead>
<tr>
<th></th>
<th>Tons Landfilled</th>
<th>Tons Recycled</th>
</tr>
</thead>
<tbody>
<tr>
<td>3rd Qtr 13</td>
<td>69.9%</td>
<td>0%</td>
</tr>
<tr>
<td>4th Qtr 13</td>
<td>68.3%</td>
<td>0%</td>
</tr>
<tr>
<td>YTD</td>
<td></td>
<td>85.4%</td>
</tr>
</tbody>
</table>

Tons Recycled
Facilities Management Strategic Planning Session – Fourth Quarter FY 2013

GOAL #6 – Promote Good Stewardship

Strategy 6.2 Develop a Sustainable Campus
Objective 6.2.2 Increase Percent of Solid Waste diversion on Campus to 40% 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>Quarter</th>
<th>Series1</th>
<th>Series2</th>
<th>Total</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Baseline 4th Qtr FY08</td>
<td>198 tons</td>
<td>695 tons</td>
<td>893 tons</td>
<td>28%</td>
</tr>
<tr>
<td>1st Qtr FY13</td>
<td>305 tons</td>
<td>748 tons</td>
<td>1,053 tons</td>
<td>41%</td>
</tr>
<tr>
<td>2nd Qtr FY13</td>
<td>262 tons</td>
<td>732 tons</td>
<td>994 tons</td>
<td>36%</td>
</tr>
<tr>
<td>3rd Qtr FY13</td>
<td>269 tons</td>
<td>775 tons</td>
<td>1,044 tons</td>
<td>35%</td>
</tr>
<tr>
<td>4th Qtr FY13</td>
<td>239 tons</td>
<td>629 tons</td>
<td>868 tons</td>
<td>38%</td>
</tr>
</tbody>
</table>
GOAL #6 – Promote Good Stewardship

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

ACTION PLAN

• Waste Reduction and Recycling
  – Actions Complete -
    TOTAL recycling for quarter ___% (all totals are not in), ___% (all totals are not in) for the year
    • Continue to provide timely and efficient collection service of recyclable and reusable items to the entire campus and outreach efforts to University community
    • Held Spring Campus Clean UP and Tree Plantings in March, EARTH DAY 2013 Festival, provided tours and presentations across campus, conducted waste audits for campus to determine amount of recyclables in waste stream, designing Zero Waste Options for FOOTBALL, assisted Brian Guns and NC APPA for the 2013 NC APPA conference at UNC Greensboro
  – 1st Quarter Actions Planned
    • Continue to conduct Waste audits for campus to determine amount of recyclables in waste stream
    • First Zero Waste FOOTBALL Game- work with FOOTBALL committees and several student organizations

• C & D
  – Actions Complete -
    • Overall C&D recycling rate for Capital Projects is 88%; recycling rate for informal projects is 54%.
  – 1st Quarter Actions Planned
    • Continue collecting/tracking recycling information and acting as resource for contractors.
GOAL #6 – Promote Good Stewardship

Strategy 6.2: Develop a Sustainable Campus

Objective 6.2.4. Achieve 60% of STARS credits

ACTION PLAN

This objective will be replaced by new Tactic 5.2.3: Achieve Bronze rating on Sustainability tracking and reporting system (STARS).
Measure: Number of points completed in each category.

Lead: Facilities Planning
Balanced Scorecard Category: Financial
GOAL #6 – Promote Good Stewardship

Strategy 6.2 Develop a Sustainable Campus

Objective 6.2.4 Achieve 60% of STARS credits

Measure: Number of points completed in each category.

Balanced Scorecard Category: Financial

Bronze Rating

STARS Categories
- Innovation
- Planning Admin and Engagement
- Operations
- Education and Research

UNC Charlotte Status
GOAL #6 – Promote Good Stewardship

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

**ACTIONS TO REDUCE CAMPUS ENERGY USAGE**

- Pursue lighting retrofits in buildings that still have T-12’s
  - GA lighting only PC Construction by cal year end
  - IGA Starts in June
- Continue retro-commissioning program
- Upgrade BAS to enable setbacks
- Energy efficient equipment upgrades
- Complete Performance Contract into construction
- Exterior Lighting upgrades to LED
Facilities Management Strategic Planning Session – 4th QTR FY 2013

GOAL #6 – Promote Good Stewardship

Strategy 6.3 Conserve Natural Resources
Objective 6.3.1 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 25%
Mandated Reduction 30%

STATUS
Facilities Management Strategic Planning Session – 3rd QTR 2013

GOAL #6 – Promote Good Stewardship

Strategy 6.3 Conserve Natural Resources

Objective 6.3.2 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 24 Gal/GSF

FY 10 Goal
Facilities Management Strategic Planning Session – Fourth Quarter FY2013

GOAL #6 – Promote Good Stewardship

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

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

Balanced Scorecard Category: Financial Perspective
Facilities Management Strategic Planning Session – Fourth Quarter FY2013

GOAL #6 – Promote Good Stewardship

Strategy 6.5 Improve African American Participation on Capital Projects
Objective 6.5.2 3% overall African American Participation on Capital Projects $500K and above

Measure: Total Capital Dollars awarded to African American Contractors divided by Total Contract Dollars

Balanced Scorecard Category: Financial Perspective

African American Participation
Capital Projects ≥ $500K

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

4thQtr STATUS
Nothing to report

FY2013 STATUS

Objective 6.5.3 – Encourage Purchasing to establish a goal for African American participation

Continue –

- Work with University staff/GCs/agencies/organizations, etc. to identify and promote utilization of HUB firms
- Encourage participation in all ethnic segments
- Work with CM firms in review of 1st Tier Subcontractors MBE Affidavits and “Good Faith Effort” documentation to ensure compliance. Hold CM firms accountable!
- Program Compliance
- Education & Outreach
Facilities Management Strategic Planning Session – Fourth Quarter FY2013

GOAL #6 – Promote Good Stewardship

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

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

Balanced Scorecard Category: Financial Perspective
GOAL # 6 – Promote Good Stewardship

Strategy 6.5 Improve Historically Underutilized Business Participation

Objective 6.5.4 13% overall HUB participation on informal projects below $30,000 including 3% African American participation.

ACTION PLAN FOR IMPROVEMENT

• Amanda Caudle assigned as Design Service Coordinator to work with Dorothy Vick, Doug Pierce and JOC Contractors in seeking new HUB Contractor opportunities - All Coordinators are encouraged to try new vendors for work on our Under $30K projects. Amanda advises other Coordinators of new opportunities - **Ongoing.**

• 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 – Fourth Quarter FY 2013

GOAL # 6 – Promote Good Stewardship

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

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

Balanced Scorecard Category: Internal Business Process

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

<table>
<thead>
<tr>
<th>QUARTERLY REVIEW</th>
<th>Value of Contracts under 30K</th>
<th>H.U.B. Contribution</th>
<th>HUB Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY'09</td>
<td>$996,756</td>
<td>$89,479</td>
<td>9.0%</td>
</tr>
<tr>
<td>FY'10</td>
<td>$1,452,202</td>
<td>$88,703</td>
<td>6.1%</td>
</tr>
<tr>
<td>FY'11</td>
<td>$3,924,102</td>
<td>$857,125</td>
<td>21.8%</td>
</tr>
<tr>
<td>FY'12</td>
<td>$2,878,027</td>
<td>$891,793</td>
<td>31.0%</td>
</tr>
<tr>
<td>QTR 1</td>
<td>$711,791</td>
<td>$180,135</td>
<td>25.31%</td>
</tr>
<tr>
<td>QTR 2</td>
<td>$604,030</td>
<td>$164,598</td>
<td>27.25%</td>
</tr>
<tr>
<td>QTR 3</td>
<td>$787,581</td>
<td>$280,075</td>
<td>35.56%</td>
</tr>
<tr>
<td>QTR 4</td>
<td>$787,601</td>
<td>$277,256</td>
<td>35.20%</td>
</tr>
<tr>
<td>FY '13 STATUS</td>
<td>$2,891,003</td>
<td>$902,065</td>
<td>31.20%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>QUARTERLY REVIEW</th>
<th>Value of Contracts under 30K</th>
<th>African Am. Contribution</th>
<th>African Am. Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY'09</td>
<td>$996,756</td>
<td>$40,894</td>
<td>4.1%</td>
</tr>
<tr>
<td>FY'10</td>
<td>$1,452,202</td>
<td>$73,987</td>
<td>5.1%</td>
</tr>
<tr>
<td>FY'11</td>
<td>$3,924,102</td>
<td>$77,377</td>
<td>2.0%</td>
</tr>
<tr>
<td>FY'12</td>
<td>$2,878,027</td>
<td>$46,475</td>
<td>1.6%</td>
</tr>
<tr>
<td>QTR 1</td>
<td>$711,791</td>
<td>400</td>
<td>0.06%</td>
</tr>
<tr>
<td>QTR 2</td>
<td>$604,030</td>
<td>6,825</td>
<td>1.13%</td>
</tr>
<tr>
<td>QTR 3</td>
<td>$787,581</td>
<td>85,894</td>
<td>10.91%</td>
</tr>
<tr>
<td>QTR 4</td>
<td>$787,601</td>
<td>22,100</td>
<td>2.81%</td>
</tr>
<tr>
<td>FY '13 STATUS</td>
<td>$2,891,003</td>
<td>$115,219</td>
<td>3.99%</td>
</tr>
</tbody>
</table>
Balance Score Card

DISCUSSION

FINANCIAL PERSPECTIVE

<table>
<thead>
<tr>
<th>Strategic Objective</th>
<th>Goal</th>
<th>Lag Measures/Lead Measures</th>
<th>Target</th>
<th>Actual 1st Quarter</th>
<th>2nd Quarter</th>
<th>3rd Quarter</th>
<th>4th Quarter</th>
<th>YTD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage Budget</td>
<td>6.1.1</td>
<td>Balanced Budget @ End of Year</td>
<td>100%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Maximize Revenue Streams</td>
<td>6.1.2</td>
<td>Increase Grants/Supplemental Funding</td>
<td>25%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Promote fiscal responsibility</td>
<td>6.1.3</td>
<td>Admin Cost/SGF +/-5% of APPA Avg for Peer Inst.</td>
<td>&quot; +/-5%&quot;</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>6.1.4</td>
<td>Custodial Cost/SGF +/-5% of APPA Avg for Peer Inst</td>
<td>&quot; +/-5%&quot;</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>6.1.5</td>
<td>Maint Cost/SGF +/-5% of APPA Avg for Peer Inst</td>
<td>&quot; +/-5%&quot;</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>6.1.6</td>
<td>Landscape Cost/SGF +/-5% of APPA Avg for Peer Inst</td>
<td>&quot; +/-5%&quot;</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>6.1.7</td>
<td>Exceed Labor Services Payroll requirements by 10%</td>
<td>$400,000/qtr</td>
<td>$530,398.33</td>
<td></td>
<td></td>
<td></td>
<td>$454,289.51</td>
</tr>
<tr>
<td>Sustainable Practices</td>
<td>6.2.1</td>
<td>C&amp;D Recycling - Informal Projects</td>
<td>50%</td>
<td>68%</td>
<td></td>
<td></td>
<td></td>
<td>85.4%</td>
</tr>
<tr>
<td></td>
<td>6.2.2</td>
<td>C&amp;D Recycling Capital Projects</td>
<td>50%</td>
<td>38%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>6.2.3</td>
<td>Increase % Solid Waste Recycled (Baseline 2008)</td>
<td>5% (29.4%)</td>
<td>action plan</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Conserve Natural Resources</td>
<td>6.3.1</td>
<td>Energy Usage by 2015</td>
<td>-30%</td>
<td>25%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>6.3.2</td>
<td>Water Usage by 2010</td>
<td>-20%</td>
<td>48%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Improve HUB Participation</td>
<td>6.5.1</td>
<td>12% HUB participation on 80% of Capital Projects</td>
<td>80%</td>
<td>no data</td>
<td></td>
<td></td>
<td></td>
<td>100%</td>
</tr>
<tr>
<td></td>
<td>6.5.2</td>
<td>3% African American Participation on Capital Projects</td>
<td>3%</td>
<td>no data</td>
<td></td>
<td></td>
<td></td>
<td>10.4%</td>
</tr>
<tr>
<td></td>
<td>6.5.3</td>
<td>13% HUB participation on Informal Proj $30K and above</td>
<td>13%</td>
<td>39%</td>
<td></td>
<td></td>
<td></td>
<td>47%</td>
</tr>
<tr>
<td></td>
<td>6.5.4</td>
<td>13% HUB for Informal Proj below $30,000 inc. 3% AA</td>
<td>13%/3%</td>
<td>35.2%/2.81%</td>
<td></td>
<td></td>
<td></td>
<td>31.2%/3.99%</td>
</tr>
</tbody>
</table>
Balance Score Card

INTERNAL PROCESSES Perspective

Strategic Objectives:
- Labor Availability
- Logistics Efficiency
- Optimize Supply Chain
- Improve Process Reliability
- Manage Technical Resources
- Master/Project Planning Process
- Capital Project Administration
- Develop High-Quality Staff
GOAL #1 – Improve Facilities Operations

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

ACTION PLAN

• Actions Planned

1 – Continue to stress reporting and recording of employee’s time.
   a) Meet with shop supervisor and PA’s to review
   b) Stress importance with all employees.
   c) Get supervisors to spot check employees and review white sheets in detail
2 - Get employees out of the shop
3 - Adjust goal to 70% (more realistic).
4 - Evaluate EDA’s for future use. Do they increase our efficiency?
Facilities Management Strategic Planning Session – Fourth Quarter FY 2013

GOAL #1 – Improve maintenance and operations of the Campus

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

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

Goal: Greater than 80% for the year

Balanced Scorecard Category: Internal Business Process

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Wrench Time</th>
<th>Goal &gt; 80% for year</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Qtr FY13</td>
<td>74.4%</td>
<td></td>
</tr>
<tr>
<td>2nd Qtr FY13</td>
<td>48.6%</td>
<td></td>
</tr>
<tr>
<td>3rd Qtr FY13</td>
<td>75.1%</td>
<td></td>
</tr>
<tr>
<td>4th Qtr FY13</td>
<td>74.6%</td>
<td></td>
</tr>
<tr>
<td>Average (year-to-date)</td>
<td>65.2%</td>
<td></td>
</tr>
</tbody>
</table>
GOAL #1 – Improve Facilities Operations

Strategy: 1.2 Improve Logistics Efficiency
Objective: 1.2.1 Improve Stock Fill Rate to over 97%
Objective: 1.2.2 Reduce Average Non-stock Requisition to Receipt Time to 4.0 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 Req to PO processing time; send out daily reminders
4 – Continue to send out daily reminders for approvals.
Facilities Management Strategic Planning Session – Fourth Quarter FY 2013

GOAL #1 – Improve maintenance and operations of the Campus

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

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

Goal: Greater than 97%

Balanced Scorecard Category: Internal Business Process

Stock Fill Rate

Goal > 97% for year
Facilities Management Strategic Planning Session – Fourth Quarter FY 2013

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

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

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

**Goal:** Less than 4 days

**Balanced Scorecard Category:** Internal Business Process

---

**Receipt Time**

<table>
<thead>
<tr>
<th>Quarter</th>
<th>1st Qtr FY13</th>
<th>2nd Qtr FY13</th>
<th>3rd Qtr FY13</th>
<th>4th Qtr FY13</th>
<th>Average (year-to-date)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Qtr FY13</td>
<td>3.48</td>
<td>4.69</td>
<td>4.19</td>
<td>3.95</td>
<td>4.08</td>
</tr>
</tbody>
</table>

**Goal < 4 days**
GOAL #1 – Improve Facilities Operations

Strategy: 1.5 Improve Reliability
Objective: 1.5.1 Improve Completion of Preventative Maintenance Work Requests to over 90%
1.5.2 Decrease number of Unscheduled Equipment Replacement Projects by 2

ACTION PLAN

- Actions Planned

1 – Complete development of PM Program converting from old PM Module to new PM Module.
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.
Facilities Management Strategic Planning Session – Fourth Quarter FY 2013

GOAL #1 – Improve maintenance and operations of the Campus

Strategy: 1.5 Improve Reliability
Objective: 1.5.1 Improve Completion of Preventative Maintenance Work Requests to over 90%
Measure: Percentage of Preventive Maintenance Work Requests Completed vs. (Completed + Cancelled)
Goal: Greater than 90%

Balanced Scorecard Category: Internal Business Process

Preventive Maintenance

Goal > 90%

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Qtr FY13</td>
<td>96.61%</td>
</tr>
<tr>
<td>2nd Qtr FY13</td>
<td>86.95%</td>
</tr>
<tr>
<td>3rd Qtr FY13</td>
<td>98.07%</td>
</tr>
<tr>
<td>4th Qtr FY13</td>
<td>89.45%</td>
</tr>
<tr>
<td>Average (year-to-date)</td>
<td>92.77%</td>
</tr>
</tbody>
</table>
Facilities Management Strategic Planning Session – Fourth Quarter FY 2013

GOAL #1 – Improve maintenance and operations of the Campus

Strategy: 1.5 Improve Reliability
Objective: 1.5.2 Decrease number of Unscheduled Equipment Replacement Projects by 2

Measure: Number of Unscheduled Equipment Replacement Projects in Quarter

Goal: Less than 8 per year or 2 per quarter

Balanced Scorecard Category: Internal Business Process
GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

Objective: 2.1.1 Completion of the Facilities Management Five-Year Technology Plan by FY 2015

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

**ACTION PLAN**

**Actions Completed:**
1. Invoicing for FIS FY13 Ordering Completed
2. New Computer and Ricoh Printer replacement roll out completed
3. Capital Improvements Completed by BRG: Tested & Customer Approval
4. Completed Primavera Upgrade via PMOLink, Inc
5. Draft completed by BRG for BIM standards document

**Actions Planned:**
1. Finalize SDI Development- Complete UAT Meet for Customer Review & Finalize for Production. Complete SOP updates & user documentation
2. Meet for FY14 FIS Project Prioritization & Approval
3. ARCHIBUS Key Management Phase Two – Customer Reports
4. BIM – Complete/Approve final draft of Standards; Implement into Design Manual
FM 5YP Prioritized Projects – FY13 - 14

1. Enterprise Data Assistant (EDA) FO-WR Project Zone Shops – Zones 2-4 EDA
   Issuing completed, Zone 1 - complete, Zone 5-6 – **On Hold**

2. Enterprise Data Assistant (EDA) FO-WR Project Core Shops- **On Hold**

3. Enterprise Data Assistant (EDA) Housekeeping Project - **On Hold**

4. ARCHIBUS - Equipment and PM Management – Development Completed Nov 2012

5. BAS R2 Upgrades- Hardware installed; Graphics and Punch list still to be finalized

6. ARCHIBUS Key Management – Phase Two – Development & Bug Resolution
   Completed Aug 2012

7. Key Management Reports – **On Hold**

8. Facilities Condition Assessment Program (FCAP2) – Pilot Pending (**On Hold**)

9. Asset Management – Working with AUX and COE - Upgrade

10. SDI Punch In Implementation – In Process: Review, finalization & Training to be
    Completed

11. Building Information Modeling (BIM) – Phase 1 (Standards) – In Process

12. Capital Improvements – Completed & Bug Resolution in process

13. Primavera Upgrade – Completed

Facilities Management Strategic Planning Session – Fourth Quarter FY 2013

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

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

Objective:  2.1.1  Completion of the Facilities Management Five-Year Technology Plan by Fiscal 2015

Measure:  Completion of Five-Year Technology Milestones

Task Completion Milestones Percentage (FY10 – FY15)

Balanced Scorecard Category: Internal Processes

<table>
<thead>
<tr>
<th>Quarter</th>
<th>FY13</th>
<th>FY14</th>
<th>FY15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Qtr 1</td>
<td>34.29%</td>
<td>25.00%</td>
<td></td>
</tr>
<tr>
<td>Qtr 2</td>
<td>60.71%</td>
<td>50.00%</td>
<td>70.59%</td>
</tr>
<tr>
<td>Qtr 3</td>
<td>70.59%</td>
<td>75.00%</td>
<td>78.67%</td>
</tr>
<tr>
<td>Qtr 4</td>
<td>78.67%</td>
<td>100.00%</td>
<td></td>
</tr>
</tbody>
</table>

Cumulative Project Average: 78.67%
Facilities Management Strategic Planning Session – Fourth Quarter FY 2013

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

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

Objective: 2.1.1 Completion of the Facilities Management Five-Year Technology Plan by Fiscal 2015

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

Balanced Scorecard Category: Internal Processes
GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

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

Objective 2.3.1. 80% of existing projects documented and input into the CRDM system.

Tactic:
- Engage Facilities and Operations on Inspections
- Work with Facilities & Operations and Facilities Information Systems on Process
- Work with Facilities Information Systems on Technical Issues and Training

ACTION PLAN

- Actions Planned:
  - Amend the objective above to reflect phase 2
  - Work with other sections in FM on the process.
  - Work with FIS on the dashboard (incl. accuracy)

This objective will be replaced by new Tactic 2.3.1: Improve the Facilities Condition Index (FCI) for buildings on campus by 5%.

Lead: Facilities Planning
Balanced Scorecard Category: Internal Business Process
Facilities Management Strategic Planning Session – Fourth Quarter FY 2013

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

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

Objective 2.3.1. 80% of existing projects documented and input into the CRDM system.

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

Balanced Scorecard Category: Internal Business Process
GOAL #3 – Deliver New Facilities that Support the University’s Mission

Strategy 3.1: Improve space utilization throughout the university.

Objective 3.1.1 100% of space audits by Division; Documented and updated into Archibus NLT June 2013

ACTION PLAN

Continued walk through and documentation of existing condition.

This objective will be replaced by new Tactic 2.4.1: 80% of Departments/Colleges with +/- 5% of System-wide space standards.

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 – Fourth Quarter FY 2013

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

Strategy 3.1: Improve space utilization throughout the university.

Objective 3.1.1 100% of space audits by Division; Documented and updated into Archibus NLT June 2013.

Measure: % Initial audits and updates completed.

Balanced Scorecard Category: Internal Business Process
GOAL #3 – Deliver New Facilities that Support the University’s Mission

**Strategy 3.2** Improve the Six Year Plans for Appropriated & Non-appropriated Capital Improvements

**Objective 3.2.1** 100% of Capital Projects on the Appropriated and Non-Appropriated Six Year Capital Improvements plan are approved and ready for submission to GA by Fall, 2012

### ACTION PLAN

- **Actions Planned:**
  - Obtain guidance on direction of CID Phase II in order to determine next set of needs.
  - Continue work on CID projects for hand-off to Capital.

  **This objective will be deleted.**

Lead: Facilities Planning

Balanced Scorecard Category: Internal Business Process

---

**Appropriated Projects**

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

* Pending AA review, changes, and approval
Facilities Management Strategic Planning Session – Fourth Quarter FY 2013

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

Strategy 3.2  Improve the Six Year Plans for Appropriated & Non-appropriated Capital Improvements

Objective 3.2.1 100% of Capital Projects on the Appropriated and Non-Appropriated Six Year Capital Improvements Plan are approved and ready for submission to GA by end of FY 12.

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

Balanced Scorecard Category: Internal Business Process
GOAL #3 – Deliver New Facilities that Support the University’s Mission

Strategy  3.3  Improve the Capital Design Process
Objective  3.3.1  90% of designers under contract within 120 days of Project posting in CAPSTAT
Objective  3.3.2  90% of designs complete by the scheduled completion date
Objective  3.3.3  90% of designs complete within design budgeted fee

ACTION PLAN

•  Actions Planned – 3.3.1
  1. Baseline Schedules – Accurate
  2. Baseline Schedules – Refer to them
  3. Push Designers to stay on schedule.

•  Actions Planned – 3.3.2
  1. Baseline Schedules – Accurate
     a)  Sherry, John & Jeanine to check
     b)  Sherry to help PMs setup properly & maintain
  2. Keep end users up to date on overall schedule
     a)  Update team at all scheduled design meetings
     b)  Hold designer accountable
  3. Add milestones
     a)  DD & CD Shops presentations & feedback
     b)  Chancellor approvals (colors, exteriors, etc.)

•  Actions Planned – 3.3.3
  1. Print project budget / financial sheets & share with end users
  3. Protect contingency
  4. Know project authorization
Facilities Management Strategic Planning Session – Fourth Quarter FY 2013

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

**Strategy** 3.3  
Improve the Capital Design Process

**Objective** 3.3.1  
90% of designers under contract within 120 days of the project advertisement being posted on the web

**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-10</td>
<td>10</td>
<td>9</td>
<td>3</td>
<td>75%</td>
</tr>
<tr>
<td>Summary FY-11</td>
<td>11</td>
<td>2</td>
<td>6</td>
<td>25%</td>
</tr>
<tr>
<td>Summary FY-12</td>
<td>6</td>
<td>2</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>Summary FY-13</td>
<td>14</td>
<td>3</td>
<td>6</td>
<td>33%</td>
</tr>
<tr>
<td>1st Qtr. FY-13</td>
<td>6</td>
<td>1</td>
<td>1</td>
<td>0%</td>
</tr>
<tr>
<td>2nd Qtr. FY-13</td>
<td>3</td>
<td>2</td>
<td>1</td>
<td>67%</td>
</tr>
<tr>
<td>3rd Qtr. FY-13</td>
<td>3</td>
<td>0</td>
<td>2</td>
<td>0%</td>
</tr>
<tr>
<td>4th Qtr. FY-13</td>
<td>2</td>
<td>0</td>
<td>3</td>
<td>0%</td>
</tr>
</tbody>
</table>

Objective for 4th Quarter is 0%  
Year to date is 33%
Facilities Management Strategic Planning Session – Fourth Quarter FY 2013

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

**Strategy**  
3.3 Improve the Capital Design Process

**Objective**  
3.3.2 90% of designs complete by the scheduled completion time

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

**Balanced Scorecard Category:** Internal Business Process

<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-10</td>
<td>9</td>
<td>5</td>
<td>63%</td>
</tr>
<tr>
<td>Summary FY-11</td>
<td>6</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>Summary FY-12</td>
<td>5</td>
<td>3</td>
<td>63%</td>
</tr>
<tr>
<td>Summary FY-13</td>
<td>3</td>
<td>1</td>
<td>75%</td>
</tr>
<tr>
<td>1st Qtr. FY-13</td>
<td>1</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>2nd Qtr. FY-13</td>
<td>0</td>
<td>1</td>
<td>0%</td>
</tr>
<tr>
<td>3rd Qtr. FY-13</td>
<td>1</td>
<td>0</td>
<td>100.0%</td>
</tr>
<tr>
<td>4th Qtr. FY-13</td>
<td>1</td>
<td>0</td>
<td>100.0%</td>
</tr>
</tbody>
</table>

**Objective for 4th Quarter is 100%**

**Year to date is 75%**
Facilities Management Strategic Planning Session – Fourth Quarter FY 2013

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

**Strategy**  3.3  Improve the Capital Design Process

**Objective**  3.3.3  90% of designs complete within design budgeted fee

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

**Balanced Scorecard Category:**  Internal Business Process

<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>
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<tbody>
<tr>
<td>Parking Deck J</td>
<td>$2,211,057</td>
<td>$946,200</td>
<td>$946,200</td>
<td>-57.2%</td>
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<td>PORTAL</td>
<td>$2,466,950</td>
<td>$2,200,000</td>
<td>$2,200,000</td>
<td>-10.8%</td>
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<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>
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<tr>
<td>Res. Hall Ph. X</td>
<td>$2,809,632</td>
<td>$2,147,890</td>
<td>$2,147,890</td>
<td>-23.6%</td>
<td>0.0%</td>
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<td>Res. Hall Ph. XI</td>
<td>$3,695,657</td>
<td>$2,078,598</td>
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<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>
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<td>RUP IV</td>
<td>$385,000</td>
<td>$385,000</td>
<td>$385,000</td>
<td>0.0%</td>
<td>0.0%</td>
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</tr>
<tr>
<td>Oak Hall Renovation</td>
<td>$591,176</td>
<td>$531,000</td>
<td>$531,000</td>
<td>-10.2%</td>
<td>0.0%</td>
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<tr>
<td>Holshouser Hall Reno.</td>
<td>$1,039,730</td>
<td>$1,165,000</td>
<td>$1,165,000</td>
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<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>
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<tr>
<td>Cone Plaza</td>
<td>$144,768</td>
<td>$152,000</td>
<td>$152,000</td>
<td>5.0%</td>
<td>0.0%</td>
<td>1</td>
</tr>
</tbody>
</table>

**Objective is 90%**

*Factors in budget fee changes: Owner changes scope, owner adds more scope, ADA compliances.*
**GOAL #3 – Deliver New Facilities that Support the University’s Mission**

**Strategy 3.4**

Improve Administration of the Capital Construction Process

**Objective 3.4.2**

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

**ACTION PLAN**

- Actions Planned
  1. Maintain & Print project budgets & account reports monthly
  2. Share budgets with AVC and end users.
  3. Hold contingency for unforeseen conditions & project requirements.
  4. Manage scope creep.
  5. Continue After Action Reviews to increase Customer Satisfaction

This objective will be replaced by new Tactic 2.5.1: Develop lifecycle cost analysis and funding process for capital projects.

Lead: Facilities Planning

Balanced Scorecard Category: Internal Business Process
Facilities Management Strategic Planning Session – Fourth Quarter FY 2013

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

Strategy 3.4 Improve Administration of the Capital Construction Process

Objective 3.4.2 95% of Capital Projects completed within the original construction contract amount or Guaranteed Maximum Price (GMP) plus 3% new construction 5% renovation (contingency)

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

Balanced Scorecard Category: Internal Business Process

Objective is currently at 90%. Goal is 95%

*Factors in contract $$ changes could include: Owner changes in construction, unforeseen conditions, design omissions.
GOAL #3 – Deliver New Facilities that Support the University’s Mission

Strategy 3.5: Improve Infrastructure improvement planning

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

ACTION PLAN

- Actions Planned:
  - Ensure projects in CRDM are appropriately listed – Parent/Child relationships
  - Update and review projects based on updated information.
  - Integrate CID information – above and below the line. Move projects as applicable.
  - Incorporate CRDM process with Customers
  - Assist in initiating program into CRDM

This objective will be deleted.

Lead: Facilities Planning
Balanced Scorecard Category: Internal Business Process
Facilities Management Strategic Planning Session – Fourth Quarter FY 2013

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

Strategy 3.5: Improve Infrastructure improvement planning

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

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

Balanced Scorecard Category: Internal Business Process
GOAL #3 – Deliver New Facilities that Support the University’s Mission

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

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

ACTION PLAN

• Actions Planned:
  o Receive input from the Departments
  o Compile changes
  o Conduct next committee meeting and updates

This objective will be deleted.

Lead: Facilities Planning
Balanced Scorecard Category: Internal Business Process
Facilities Management Strategic Planning Session – Fourth Quarter FY 2013

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

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

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

Measure: % of sections updated and posted.

Balanced Scorecard Category: Internal Business Process
## DISCUSSION

### INTERNAL PROCESSES PERSPECTIVE

<table>
<thead>
<tr>
<th>Strategic Objective</th>
<th>Goal</th>
<th>Lag Measures/Lead Measures</th>
<th>Target</th>
<th>Actual</th>
<th>1st Quarter</th>
<th>2nd Quarter</th>
<th>3rd Quarter</th>
<th>4th Quarter</th>
<th>YTD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Labor Availability</td>
<td>1.1.1</td>
<td>Increase Wrench Time</td>
<td>&gt;80%</td>
<td>74.6%</td>
<td>69%</td>
<td>69%</td>
<td>69%</td>
<td>69%</td>
<td>69%</td>
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<tr>
<td>Logistics Efficiency</td>
<td>1.2.1</td>
<td>Stock Fill Rate</td>
<td>&gt;97%</td>
<td>94%</td>
<td>94%</td>
<td>94%</td>
<td>94%</td>
<td>94%</td>
<td>91%</td>
</tr>
<tr>
<td>Optimize Supply Chain</td>
<td>1.2.2</td>
<td>Non-stock cycle time (request to receipt time)</td>
<td>&lt;4 days</td>
<td>3.95</td>
<td>4.1</td>
<td>4.2</td>
<td>4.3</td>
<td>4.4</td>
<td>4.5</td>
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<tr>
<td>Improve Process Reliability</td>
<td>1.5.1</td>
<td>On-time Prev. Maintenance completion</td>
<td>&gt; 90%</td>
<td>89.45%</td>
<td>89.45%</td>
<td>89.45%</td>
<td>89.45%</td>
<td>89.45%</td>
<td>89.45%</td>
</tr>
<tr>
<td></td>
<td>1.5.2</td>
<td>Reduce Unscheduled equipment repl projects by 15%</td>
<td>&lt;2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
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<tr>
<td>Manage Technical Resources</td>
<td>2.1.1</td>
<td>Completion of FM 5-YR Tech. Plan by 2015</td>
<td>100%</td>
<td>78.67%</td>
<td>80%</td>
<td>80%</td>
<td>80%</td>
<td>80%</td>
<td>80%</td>
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<tr>
<td>Master/Project Planning Process</td>
<td>2.3.1</td>
<td>80% of Existing Projects Documented and Input into the CRDM by July 2011</td>
<td>80%</td>
<td>90%</td>
<td>90%</td>
<td>90%</td>
<td>90%</td>
<td>90%</td>
<td>90%</td>
</tr>
<tr>
<td></td>
<td>3.1.1</td>
<td>100% of Space Audits by Division; Documented and Updated into Archibus NLT December 2012.</td>
<td>100%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td></td>
<td>3.2.1</td>
<td>100% of Capital Projects on the Appropriated and Non-Appropriated Six Year Capital Improvements Plan approved and ready for submission to GA by end of FY12</td>
<td>100%</td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Capital Project Administration</td>
<td>3.3.1</td>
<td>Designers Under Contract w/in 120 days of Posting in CAPSTAT</td>
<td>90% w/in 120</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>3.3.2</td>
<td>90% of Designs Complete by Scheduled Comp. Date</td>
<td>90%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>3.3.3</td>
<td>90% of Designs w/in Design Budgeted Fee</td>
<td>90%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>3.4.2</td>
<td>95% of Cap Prof completed w/in orig contract or GMP</td>
<td>90%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>3.5.1</td>
<td>80% of Infrastructure Projects Integrated into Capital Construction Project Scopes</td>
<td>80%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>3.6.1</td>
<td>80% of Revisions Integrated into the Design and Construction Manual</td>
<td>80%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Balance Score Card
Learning & Growth Perspective

Strategic Objectives:
Develop high quality staff
Retain high quality staff
Develop positive culture
Improve Employee Safety
Facilities Management Strategic Planning Session - Fourth Quarter FY 2013

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

Strategy 5.1  Recruit a talented and diverse workforce in a timely fashion

Objective 5.1.1  Benchmark vacancy time of no longer than 80 calendar days – Nonexempt
Objective 5.1.2  Benchmark vacancy time of no longer than 120 calendar days - Exempt

Objective 5.1.2  100% of positions filled through targeted selection process by FY 2010

ACTION PLAN

- Time-to-fill for both exempt and non-exempt positions are in the red.
- New vacancy reports have been established.
- The reports will be distributed to the appropriate FM units on a monthly basis.
- We will request a recruitment activity update for all vacancies from each FM unit.
Facilities Management Strategic Planning Session – Fourth Quarter FY 2013

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

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

Measure: Days needed to fill vacant position

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

Average Number of Days to Fill Nonexempt (Hourly) Vacancies

Goal: 80 days
GOAL #5 – Develop a valued, well-trained, motivated and diverse workforce

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

Measure: Days needed to fill vacant position

Balanced Scorecard Category: Innovation and Learning Perspective/Learning and Growth
Facilities Management Strategic Planning Session - Fourth Quarter FY 2013

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

(22%)

Strategy 5.1 Recruit a talented and diverse workforce in a timely fashion

Objective 5.1.2 100% of positions filled through targeted selection process by FY 201

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

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

Positions Filled Using Targeted Selection

<table>
<thead>
<tr>
<th>Quarter</th>
<th># of Hires</th>
<th># Number NonExempt Hired</th>
<th># Number Exempt Hired</th>
</tr>
</thead>
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<tr>
<td>Q1</td>
<td>24</td>
<td>22</td>
<td>2</td>
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<tr>
<td>Q2</td>
<td>8</td>
<td>8</td>
<td>0</td>
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<tr>
<td>Q3</td>
<td>9</td>
<td>8</td>
<td>1</td>
</tr>
<tr>
<td>Q4</td>
<td>9</td>
<td>7</td>
<td>2</td>
</tr>
</tbody>
</table>

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

Strategy 5.2  Implement training system to enhance employee performance and provide career growth

Objective 5.2.1  Increase Supervisor/Manager training to 40 Hours of per year.
Objective 5.2.2  Increase Employee training to 20 Hours per year.

ACTION PLAN

Continue to identify areas for skill development and enhancement for staff. Work to create programs around these areas. Identify resources in the Charlotte region that can provide cost-effective, quality training for employees. Attempt to get best “bang for the buck” in this area, reduce travel costs if possible and reach the majority of our employees within targeted training area.

- An example of current efforts includes the use of American Trainco, Inc. to provide on-site training for Facilities Operations staff.

W.I.G.– Develop a funding distribution model for FM training; Continue networking with peer institutions to determine best practices, then incorporate into annual fiscal plan; To date, have met with UNC Chapel Hill regarding their formula.
Facilities Management Strategic Planning Session – Fourth Quarter FY 2013

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

Strategy 5.2 Implement training system to enhance employee performance and provide career growth

Objective 5.2.1 Increase Supervisor/Manager Training to **40 Hours** per Year

Measure: Average Hours of Training provided to or Obtained by Supervisors and Managers

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

FY 13

*Training Hours for Supervisors & Managers by Quarter*

**Fiscal 2013 Results:**
- Goal: 1,800 hrs
- Actual YTD: 718.55hrs (40%)
Facilities Management Strategic Planning Session – Fourth Quarter FY 2013

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

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

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

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

**FY 13**

*Training Hours by Quarter (non-management)*

**Fiscal 2013 Results:**

- **Goal:** 8,000 hrs
- **Actual YTD:** 2955.65 hrs (37%)

**Annual Target - 20 hrs ea**

(400 employees x 20 hrs ea = 8,000 hrs total)
<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
<th></th>
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</thead>
<tbody>
<tr>
<td>Zone 1</td>
<td>40%</td>
<td></td>
<td>45%</td>
<td></td>
<td>80%</td>
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<td>33%</td>
<td>53%</td>
<td>31%</td>
<td>40%</td>
<td>23%</td>
<td>32%</td>
<td>115%</td>
<td>48%*</td>
</tr>
<tr>
<td><strong>Recycling</strong></td>
<td><strong>58%</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Lead FBO</strong></td>
<td><strong>5%</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>
GOAL #5 – Develop a valued, well-trained, motivated and diverse workforce

Strategy 5.3  Retain a Quality Workforce

Objective 5.3.1  Maintain the Annual Employee Turn-over Rate to <14%
Objective 5.3.2  Achieve 85% Overall Employee Job Satisfaction on the Annual Employee Satisfaction Survey

CONTINUOUS IMPROVEMENT ACTION PLAN

- Working with CPCC/Rowan Community College to determine feasibility of a Co-op program within FM (Trades). Met in September to review program requirements. Will meet with Rowan in February and continue initiative.

- Development of a FM Learning Library which can house “quick hit” training resources for employees. In progress...

- Investigate another “tier” in the Leadership Academy to keep “sharpening the saw”. As referenced by Clyde in the previous training information.

- Production of NEO video. In development...
Facilities Management Strategic Planning Session – Fourth Quarter FY 2013

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

**Strategy** 5.3  Retain a Quality Workforce

**Objective** 5.3.1  Maintain the Annual Employee Turn-over Rate to <14%

**Measure:**  Annual Employee Turn-over Rate

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

---

**Turnover by Quarter**

Annual Target < 14%

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Turnover</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q1</td>
<td>14%</td>
</tr>
<tr>
<td>Q2</td>
<td>3%</td>
</tr>
<tr>
<td>Q3</td>
<td>17%</td>
</tr>
<tr>
<td>Q4</td>
<td>8%</td>
</tr>
</tbody>
</table>

STATUS
Facilities Management Strategic Planning Session – 4th Quarter FY 2013

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

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

Measure: Annual Employee Turn-over Rate

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

<table>
<thead>
<tr>
<th>Year</th>
<th>FY09-10</th>
<th>FY10-11</th>
<th>FY11-12</th>
<th>FY12-13</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status</td>
<td>8%</td>
<td>9%</td>
<td>3%</td>
<td>12%</td>
</tr>
</tbody>
</table>
Facilities Management Strategic Planning Session – Fourth Quarter FY 2013

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

Strategy 5.3 Improve Employee Satisfaction
Objective 5.3.2 Achieve 85% Overall Employee Job Satisfaction on the Annual Employee Satisfaction Survey

Measure: Annual Employee Satisfaction Survey Overall Job Satisfaction Survey Question

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

Overall Satisfaction

Overall, how satisfied are you working in the Facilities Management Department (2011)

Average = 4.48

89% of all respondents expressed satisfaction with working in Facilities Management, matching the total from the 2009 survey. When examining the current data by department, the lowest levels of satisfaction come from Facilities Operations (87%) and Capital Projects (89%).
SAFETY TRENDS

Accident Reports
January – December 2013

“Stake Your Claim, Make Safety Your Aim”

Accidents (Long Form)
First Aid Only

YTD
## Balance Score Card

### DISCUSSION

#### LEARNING & GROWTH PERSPECTIVE

<table>
<thead>
<tr>
<th>Strategic Objective</th>
<th>Goal</th>
<th>Lag Measures/Lead Measures</th>
<th>Target</th>
<th>Actual</th>
<th>1st Quarter</th>
<th>2nd Quarter</th>
<th>3rd Quarter</th>
<th>4th Quarter</th>
<th>YTD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Develop high-quality staff</td>
<td>5.1.1</td>
<td>Reduce Vacancy Time Calendar Days</td>
<td>80 days/120 days</td>
<td>221/406</td>
<td>WordPress.org</td>
<td>WordPress.org</td>
<td>WordPress.org</td>
<td>WordPress.org</td>
<td>WordPress.org</td>
</tr>
<tr>
<td>Develop high-quality staff</td>
<td>5.1.2</td>
<td>Targeted Selection/Recruitment Training</td>
<td>100%</td>
<td>100%</td>
<td>WordPress.org</td>
<td>WordPress.org</td>
<td>WordPress.org</td>
<td>WordPress.org</td>
<td>100%</td>
</tr>
<tr>
<td>Retain high quality staff</td>
<td>5.2.1</td>
<td>Supervisor (all levels of supervision) Training Hours</td>
<td>1800 hrs</td>
<td>718.55</td>
<td>WordPress.org</td>
<td>WordPress.org</td>
<td>WordPress.org</td>
<td>WordPress.org</td>
<td>WordPress.org</td>
</tr>
<tr>
<td>Retain high quality staff</td>
<td>5.2.2</td>
<td>Staff (non supervisory) Training Hours</td>
<td>8000 hrs</td>
<td>2955.65</td>
<td>WordPress.org</td>
<td>WordPress.org</td>
<td>WordPress.org</td>
<td>WordPress.org</td>
<td>WordPress.org</td>
</tr>
<tr>
<td>Develop positive culture</td>
<td>5.3.1</td>
<td>Reduce Annual Turnover Rate</td>
<td>&lt;14%</td>
<td>12%</td>
<td>WordPress.org</td>
<td>WordPress.org</td>
<td>WordPress.org</td>
<td>WordPress.org</td>
<td>WordPress.org</td>
</tr>
<tr>
<td>Develop positive culture</td>
<td>5.3.2</td>
<td>Overall Annual Employee satisfaction (Last survey in 2011)</td>
<td>85%</td>
<td>No survey</td>
<td>WordPress.org</td>
<td>WordPress.org</td>
<td>WordPress.org</td>
<td>WordPress.org</td>
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<tr>
<td>Improve Employee Safety</td>
<td>6.4.1</td>
<td>Reduce Accidents to 0 (CY)</td>
<td>0</td>
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</tbody>
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*Note: The table entries are placeholders and should be replaced with actual data.*
Group Discussion