Strategic Planning Session

First Quarter - Fiscal Year 2014
July – September 2013

...Creating a Campus of Distinction
GOAL #1

Continuously Improve Operations of Campus

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

-- Harold Geneen, industrialist
GOAL #2

Create a Reliable and Sustainable Physical Infrastructure

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

-- Earl Nightingale, Motivational Speaker
GOAL #3

Foster a Customer Focused Organization

“People don’t want to communicate with an organization or a computer. They want to talk to a real, live, responsive, responsible person who will listen and help them get satisfaction.”

- Theo Michelson, State Farm Insurance
GOAL #4

Recruit, Develop, and Retain Quality Employees

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

-- Calvin Coolidge,
30th U.S. president
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

Objectives:

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%

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.
Facilities Management Strategic Planning Session – First Quarter FY 2014

GOAL #1 – Continuously Improve Operations of Campus Facilities
Objective: 1.3: Improve Work Request Process
Tactic: 1.3.1: Decrease Number of Work Orders Over 14 Days Old by 15%
Measure: Number of open reactive work orders over 14 Days from request (excluding scheduled work orders)
Lead: Facilities Operations
Balance Scorecard Category: Customer Perspective

Archibus
Report
In error
Working w/FIS
Facilities Management Strategic Planning Session – First Quarter FY 2014

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

Lead: Facilities Operations
Balance Scorecard Category: Customer Perspective

Archibus
Report
In error
Working w/FIS
GOAL #1 — Continuously Improve Operations of Campus Facilities

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

ACTION PLAN

• Actions Complete
  – Solomon Franklin attended Janitor University, “ManageMen” in Salt Lake City, Utah from October 7 – 11, 2013
  – BES Re-Org Study underway
  – All buildings not in renovation audited (self audit)
  – Changed chart to reflect summary data for last four quarters

• Actions Planned
  – Continue quarterly self audits
  – Investigate CIMS/OS1 Certification (feasibility review)
  – Survey In-state peers on Organizational Structure and shift schedule
  – Conference call with In-state peers
GOAL #1 — Continuously Improve Operations of Campus Facilities

Objective: 1.4: Improve BES Processes
Tactic 1.4.1: Achieve APPA Level 2 in 98% of Buildings
Measure: Percentage of buildings meeting APPA Level 2 cleanliness standards during quarterly inspection (APPA Benchmark)

Lead: Building Environmental Services
Balanced Scorecard Category: Internal Business Process

APPA LEVELS

<table>
<thead>
<tr>
<th></th>
<th>FY13-2nd QTR</th>
<th>FY13-3rd QTR</th>
<th>FY13-4th QTR</th>
<th>FY14-1st QTR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percentage</td>
<td>100%</td>
<td>94%</td>
<td>95%</td>
<td>74%</td>
</tr>
</tbody>
</table>

Percentage = 74%
Facilities Management Strategic Planning Session – First Quarter FY 2014

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

Lead: Facilities Operations
Balance Scorecard Category: Customer Perspective

Unscheduled Utility Outages

- Goal: Fewer than 5 outages
- Status: 7 unscheduled outages in 1st Qtr FY14
Facilities Management Strategic Planning Session – First Quarter FY 2014

GOAL #1 – Continuously Improve Operations of Campus Facilities
Objective: 1.5: Improve Facility Systems Reliability
Tactic: 1.5.4: Improve Ratio of Preventive/Predictive work requests to reactive request to 50%

Archibus Report
In error
Working w/FIS
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective: 2.2: Improve Informal Project Design and Construction Process

**Lead:** Design Services
**Balanced Scorecard Category:** Internal Business Process

<table>
<thead>
<tr>
<th>Tactic 2.2.1:</th>
<th>95% of All Construction Projects Meet Scheduled Beneficial Occupancy Date (BOD)</th>
</tr>
</thead>
<tbody>
<tr>
<td><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>

<table>
<thead>
<tr>
<th>Tactic 2.2.2:</th>
<th>Increase Project Capacity by 10 projects per year</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Measure:</strong></td>
<td>Number of Projects Completed <em>(Annual Goal)</em></td>
</tr>
</tbody>
</table>

**ACTION PLANS FOR IMPROVEMENT**

**Ongoing Improvements**

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

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

**IMPLEMENTED ACTIONS AND PLANS**

- Establish proven steps to beneficial occupancy via Customer and departmental meetings. **Ongoing.**
- Customer involvement with project Punch List process. **Ongoing**
Facilities Management Strategic Planning Session – First Quarter FY 2014

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective: 2.2: Improve Informal Project Design and Construction Process
Tactic 2.2.1: 95% of All Construction Projects Meet Scheduled Beneficial Occupancy Date (BOD)
Measure: Percentage (Number of Construction Projects completed on or before delivery date divided by total number of project completed.)

Lead: Design Services
Balanced Scorecard Category: Internal Business Process

<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 '09</td>
<td>115</td>
<td>100</td>
<td>15</td>
<td>87.0%</td>
</tr>
<tr>
<td>FY '10</td>
<td>182</td>
<td>168</td>
<td>14</td>
<td>92.3%</td>
</tr>
<tr>
<td>FY '11</td>
<td>224</td>
<td>200</td>
<td>24</td>
<td>89.3%</td>
</tr>
<tr>
<td>FY '12</td>
<td>240</td>
<td>231</td>
<td>9</td>
<td>96.3%</td>
</tr>
<tr>
<td>FY '13</td>
<td>139</td>
<td>134</td>
<td>5</td>
<td>96.4%</td>
</tr>
<tr>
<td>QTR 1</td>
<td>31</td>
<td>30</td>
<td>1</td>
<td>96.8%</td>
</tr>
<tr>
<td>QTR 2</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.0%</td>
</tr>
<tr>
<td>QTR 3</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.0%</td>
</tr>
<tr>
<td>QTR 4</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.0%</td>
</tr>
<tr>
<td>FY '14 STATUS</td>
<td>31</td>
<td>30</td>
<td>1</td>
<td>96.8%</td>
</tr>
</tbody>
</table>
Facilities Management Strategic Planning Session – First Quarter FY 2014

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective: 2.2: Improve Informal Project Design and Construction Process

Tactic 2.2.2: Increase Project Capacity by 10 projects per year

Measure: Number of Projects Completed

Lead: Design Services

Balanced Scorecard Category: Internal Business Process

Increase Project Volume by 10 Projects per year

<table>
<thead>
<tr>
<th>GOAL</th>
<th>Projects Completed</th>
<th>Project Dollars</th>
<th>A/G$/Project</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY 2003</td>
<td>150</td>
<td>$2,060,000</td>
<td>$15,147</td>
</tr>
<tr>
<td>FY 2004</td>
<td>160</td>
<td>$2,609,000</td>
<td>$16,205</td>
</tr>
<tr>
<td>FY 2005</td>
<td>170</td>
<td>$3,450,000</td>
<td>$19,942</td>
</tr>
<tr>
<td>FY 2006</td>
<td>180</td>
<td>$8,480,000</td>
<td>$43,711</td>
</tr>
<tr>
<td>FY 2007</td>
<td>200</td>
<td>$8,875,000</td>
<td>$43,293</td>
</tr>
<tr>
<td>FY 2008</td>
<td>210</td>
<td>$8,200,000</td>
<td>$43,158</td>
</tr>
<tr>
<td>FY 2009</td>
<td>220</td>
<td>$7,477,000</td>
<td>$65,017</td>
</tr>
<tr>
<td>FY 2010</td>
<td>230</td>
<td>$9,112,286</td>
<td>$50,062</td>
</tr>
<tr>
<td>FY 2011</td>
<td>240</td>
<td>$9,869,281</td>
<td>$44,059</td>
</tr>
<tr>
<td>FY 2012</td>
<td>250</td>
<td>$9,393,759</td>
<td>$80,807</td>
</tr>
<tr>
<td>FY 2013</td>
<td>250</td>
<td>$9,555,698</td>
<td>$68,746</td>
</tr>
<tr>
<td>FY 2014</td>
<td>31</td>
<td>$1,452,650</td>
<td>$46,860</td>
</tr>
</tbody>
</table>

ANNUAL

GOAL

100%

STATUS

12.4%
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

ACTION PLAN

• Actions Complete
  
  *On time*—Parking Deck J, SV High Rise Road, Hunt Village Demo, Residence Hall Phase 10
  
  *Not on time*—Emergency Power/Telcom (+1,322 days), Residence Hall Phase 11 (+34 days), SV RUP IV (+71 days)

• 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 – First Quarter FY 2014

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

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

**Balanced Scorecard Category:** Customer Perspective

<table>
<thead>
<tr>
<th>STRATEGIC REVIEW by Fiscal Year (July-June)</th>
<th># completed on schedule</th>
<th>not completed on schedule</th>
<th>% completed on time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summary FY-13</td>
<td>1</td>
<td>2</td>
<td>33%</td>
</tr>
<tr>
<td>1st Qtr. FY-14</td>
<td>4</td>
<td>3</td>
<td>57%</td>
</tr>
</tbody>
</table>

Tactic Measurement for 1st Quarter is 57%
Year to date is 57%
Facilities Management Strategic Planning Session – First Quarter FY 2014

GOAL #3  Foster a Customer Focused Organization

Objective 3.1: Continuously improve customer service/satisfaction
Tactic 3.1.1: Achieve overall FM customer satisfaction of 90%

ACTION PLAN

- Preliminary discussions with the Urban Institute are underway to begin working on the Customer Satisfaction Survey for FY 13-14.
- APPA will be contacted to obtain a copy of their customer survey standard for possible incorporation into FM’s survey.
Facilities Management Strategic Planning Session – First Quarter FY 2014

GOAL #3  Foster a Customer Focused Organization

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

Lead: Facilities Management Wide
Balanced Scorecard Category: Customer Perspective

ON HOLD
Facilities Management Strategic Planning Session – First Quarter FY 2014

GOAL #3 – Foster a Customer Focused Organization

Objective: 3.1: Continuously improve customer service/satisfaction
Tactic 3.1.3: 90% of Informal Project Customers are satisfied or very satisfied
Measure: Results from Project Customer Questionnaire

Lead: Design Services
Balanced Scorecard Category: Internal Business Process
Facilities Management Strategic Planning Session – First Quarter FY 2014

GOAL #3 – Foster a Customer Focused Organization

Objective: 3.1: Continuously improve customer service/satisfaction
Tactic 3.1.3: 90% of Informal Project Customers are satisfied or very satisfied
Measure: Results from Project Customer Questionnaire

Lead: Design Services
Balanced Scorecard Category: Internal Business Process
Facilities Management Strategic Planning Session – First Quarter FY 2014

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

 ACTION PLAN

• Actions Planned

1 – Stay 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 – First Quarter FY 2014

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

Lead: Facilities Operations
Balance Scorecard Category: Customer Perspective

Decrease the Number of Hot/Cold Calls

Goal: Decrease FY13 Average by 20%

<table>
<thead>
<tr>
<th></th>
<th>Average FY13</th>
<th>1st Qtr FY14</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>154</td>
<td>162</td>
</tr>
<tr>
<td>Hot</td>
<td>95</td>
<td>101</td>
</tr>
<tr>
<td>Cold</td>
<td>59</td>
<td>61</td>
</tr>
</tbody>
</table>
Facilities Management Strategic Planning Session – First Quarter FY 2014

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

Lead: Facilities Operations
Balance Scorecard Category: Customer Perspective

Archibus
Report
In error
Working w/FIS
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

ACTION PLAN

• Survey has been adapted to include questions from the APPA Work Climate Survey for FY 13-14. Several questions will continue to provide trend data however; many questions are new to the survey. Draft to be reviewed and approved by the AVC-FM.
• Survey will be administered through Survey Monkey program. Testing of the survey will be conducted one week prior to the “go-live” date.
• Meetings with the Urban Institute are underway. Administration of the survey is anticipated for end of October through the week prior to Thanksgiving. Sessions will be held at the UI’s computer lab for those with limited access. Jonathan Kozar will also prepare a “Kick-off” presentation at the October AEM to jump start the survey and explain the process and confidentiality.
• Survey results and report will tentatively be available in the Winter (February/March 2014).
Facilities Management Strategic Planning Session – First Quarter FY 2014

GOAL #4 Recruit, Develop and Retain Quality Employees

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

Lead: Facilities Business Office
Balanced Scorecard Category: Customer Perspective

ON HOLD
Facilities Management Strategic Planning Session – First Quarter FY 2014

GOAL #4  Recruit, Develop and Retain Quality Employees

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

Lead: Facilities Business Office
Balanced Scorecard Category: Customer Perspective

ON HOLD
## Balance Score Card

### DISCUSSION

### CUSTOMER PERSPECTIVE

<table>
<thead>
<tr>
<th>Objective</th>
<th>Tactic</th>
<th>Lag Measures/Lead Measures</th>
<th>Target</th>
<th>Actual</th>
<th>1st Quarter</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Improve Work Request Process</strong></td>
<td>1.3.1</td>
<td>Decrease Number of Work Orders Over 14 Days Old</td>
<td>15%</td>
<td>Report error</td>
<td></td>
</tr>
<tr>
<td></td>
<td>1.3.2</td>
<td>Decrease Work Request Cycle Time</td>
<td>10%</td>
<td>Report error</td>
<td></td>
</tr>
<tr>
<td><strong>Improve BES Process</strong></td>
<td>1.4.1</td>
<td>Achieve APPA Level 2 in 98% of Buildings</td>
<td>98%</td>
<td>74%</td>
<td></td>
</tr>
<tr>
<td><strong>Facility Systems Reliability</strong></td>
<td>1.5.3</td>
<td>Fewer Than 5 Unscheduled Outages per Quarter</td>
<td>&lt;5</td>
<td>7</td>
<td></td>
</tr>
<tr>
<td></td>
<td>1.5.4</td>
<td>Improve Ratio of Preventive/Predictive Work Requests to Reactive Requests</td>
<td>50%</td>
<td>Report error</td>
<td></td>
</tr>
<tr>
<td><strong>Improve Design &amp; Construction Process</strong></td>
<td>2.2.1</td>
<td>95% of Construction Projects Meet Scheduled BOD</td>
<td>95%</td>
<td>96.8%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2.2.2</td>
<td>Increase Project Capacity by 10 Projects per Year</td>
<td>10</td>
<td>12.4%</td>
<td></td>
</tr>
<tr>
<td><strong>Capital Construction Process</strong></td>
<td>2.6.1</td>
<td>90% of Capital Construction Projects Completed On Time</td>
<td>90%</td>
<td>57%</td>
<td></td>
</tr>
<tr>
<td><strong>Supporting Facilities</strong></td>
<td>2.10</td>
<td>Develop plan for supporting research facilities</td>
<td>Action Plan Only</td>
<td>no slide</td>
<td></td>
</tr>
<tr>
<td><strong>Improve Customer Service</strong></td>
<td>3.1.1</td>
<td>Achieve Overall FM Customer Satisfaction of 90%</td>
<td>90%</td>
<td>on hold</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3.1.2</td>
<td>Decrease number of Hot and Cold Calls by 20%</td>
<td>20%</td>
<td>?</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3.1.3</td>
<td>90% of Informal Project Customers Satisfied or Very Satisfied</td>
<td>90%</td>
<td>Survey unavailable</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3.1.4</td>
<td>90% of Reactive Work Request Customers Satisfied or Very Satisfied</td>
<td>90%</td>
<td>Report error</td>
<td></td>
</tr>
<tr>
<td><strong>Quality Work Environment</strong></td>
<td>4.3.1</td>
<td>90% Employees Satisfied or Very Satisfied Working in FM</td>
<td>90%</td>
<td>on hold</td>
<td></td>
</tr>
<tr>
<td></td>
<td>4.3.2</td>
<td>87% Employees Satisfied or Very Satisfied in Each Unit</td>
<td>87%</td>
<td>on hold</td>
<td></td>
</tr>
</tbody>
</table>
Balance Score Card

FINANCIAL Perspective

Objectives:

Promote Fiscal Responsibility
Conserve Natural Resources
Improve HUB Participation
Facilities Management Strategic Planning Session – First Quarter FY 2014

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

ACTION PLAN

• To improve our ability to seek out and secure grants, FM’s Grants Management Specialist has recently completed the first round (Grant Writing and Research) of national certification. The second component, Program Development and Proposal Writing) will begin later this FY.
• Additionally, our specialist has also been accepted into UNC Charlotte’s Grants Certification program. Anticipated completion is Spring 2014, March.
• Research is underway regarding the following potential submissions:
  – AFV – 2014
  – NCAPPA Award for FM’s Recognition Program
• FY 2013 APPA Facilities Performance Indicators Survey is currently underway with a deadline of December 2013.
Facilities Management Strategic Planning Session – First Quarter FY 2014

GOAL #5 Promote Good Stewardship

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

Lead: Facilities Business Office
Balanced Scorecard Category: Financial Perspective

FACILITIES MANAGEMENT OPERATIONS: SEPTEMBER 2013 (Preliminary)

<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>
</tr>
</thead>
<tbody>
<tr>
<td>OVERTIME AND PREMIUM PAY</td>
<td>$ 310,000</td>
<td>8%</td>
<td>-</td>
<td>$ 310,000</td>
<td>$ 310,000</td>
</tr>
<tr>
<td>STUDENT AND TEMPORARY WAGES</td>
<td>$ 131,500</td>
<td>3%</td>
<td>$ 31,732</td>
<td>-</td>
<td>$ 31,732</td>
</tr>
<tr>
<td>PERSONAL SERVICE CONTRACTS</td>
<td>$ 100,750</td>
<td>3%</td>
<td>$ 2,717</td>
<td>$ 45,000</td>
<td>$ 47,717</td>
</tr>
<tr>
<td>CORPORATE SERVICES CONTRACTS (Srv Agr)</td>
<td>$ 941,006</td>
<td>24%</td>
<td>$ 150,790</td>
<td>$ 401,740</td>
<td>$ 552,530</td>
</tr>
<tr>
<td>OTHER ADMINISTRATIVE EXPENSES</td>
<td>$ 81,500</td>
<td>2%</td>
<td>$ 2,101</td>
<td>-</td>
<td>$ 2,101</td>
</tr>
<tr>
<td>DOMESTIC TRAVEL/TRAINING</td>
<td>$ 80,000</td>
<td>2%</td>
<td>$ 5,484</td>
<td>-</td>
<td>$ 5,484</td>
</tr>
<tr>
<td>FIXED PURCHASED SERVICES (Maint Agr)</td>
<td>$ 265,746</td>
<td>7%</td>
<td>$ 34,087</td>
<td>$ 143,298</td>
<td>$ 177,385</td>
</tr>
<tr>
<td>OTHER PURCHASED SERVICES</td>
<td>$ 277,950</td>
<td>7%</td>
<td>$ 18,282</td>
<td>$ 32,788</td>
<td>$ 51,070</td>
</tr>
<tr>
<td>SUPPLIES</td>
<td>$ 1,448,296</td>
<td>35%</td>
<td>$ 26,315</td>
<td>$ 3,067</td>
<td>$ 29,383</td>
</tr>
<tr>
<td>EQUIPMENT</td>
<td>$ 270,554</td>
<td>7%</td>
<td>$ 33,500</td>
<td>-</td>
<td>$ 33,500</td>
</tr>
<tr>
<td>CAPITAL OUTLAY</td>
<td>$ 5,000</td>
<td>0%</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>FIXED CHARGES</td>
<td>$ 23,347</td>
<td>1%</td>
<td>$ 799</td>
<td>$ 853</td>
<td>$ 1,652</td>
</tr>
<tr>
<td>RECYCLING</td>
<td>$ 37,515</td>
<td>1%</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>
GOAL #5  Promote Good Stewardship

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

Lead: Facilities Business Office
Balanced Scorecard Category: Financial Perspective
Facilities Management Strategic Planning Session – First Quarter FY 2014

GOAL #5 Promote Good Stewardship

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

Lead: Facilities Business Office
Balanced Scorecard Category: Financial Perspective

![Administrative Total Cost per GSF Graph]

<table>
<thead>
<tr>
<th></th>
<th>Administrative Total Cost per GSF</th>
</tr>
</thead>
<tbody>
<tr>
<td>East Carolina University</td>
<td>$0.50</td>
</tr>
<tr>
<td>Portland State University</td>
<td>$0.50</td>
</tr>
<tr>
<td>University of New Mexico</td>
<td>$0.40</td>
</tr>
<tr>
<td>University of North Carolina at Charlotte</td>
<td>$0.40</td>
</tr>
<tr>
<td>University of Texas San Antonio</td>
<td>$0.50</td>
</tr>
<tr>
<td>SRAPPA Region</td>
<td>$0.40</td>
</tr>
</tbody>
</table>

$ per GSF
GOAL #5 – Promote Good Stewardship

Objective: 5.1: Promote Fiscal Responsibility
Tactic 5.1.4: Achieve Custodial Costs/Student FTE ± 5% of APPA Average for Peer Institutions

ACTION PLAN

• Actions Complete
  – Submitted square footage cleaned by BES to FBO for inclusion in the annual APPA survey
  – Requested one-time funds for supply chain management project
  – Installed hand dryers in Fretwell for pilot study

• Actions Planned
  – Monitor and report custodial cost/student FTE on an annual basis using data from APPA survey
  – Supply chain management improvements (funding requested)
Facilities Management Strategic Planning Session – First Quarter FY 2014

GOAL #5 – Promote Good Stewardship

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

Balanced Scorecard Category: Financial Perspective

Avg. cost/student = $217.99
UNCC = 6.105% above average

$228.89 plus 5% of avg.
$207.09 minus 5% of avg.

UNCC = 33.774% below SRAPPA average
GOAL #5 – Promote Good Stewardship
Objective: 5.1: Promote Fiscal Responsibility
Tactic: 5.1.5: Achieve total Maintenance cost/GSF ± 5% of APPA Average for Peer Institutions
Tactic: 5.1.6: Achieve total Landscape cost/acre ± 5% of APPA Average for Peer Institutions
Tactic: 5.1.7: All Receipt Supported Funds Accounts have a positive balance at the end of the fiscal year

ACTION PLAN

• Actions Planned

1 – Make sure that data submitted is correct.
2 – Continue to look for opportunities to expand reimbursable PM work to level peaks and valleys.
3 – Continue to look within our Facilities Operations Labor pool before going outside for additional staff support.
4 – Utilize UPA to help identify when falling behind in data entry.
Facilities Management Strategic Planning Session – First Quarter FY 2014

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

Lead: Facilities Operations
Balance Scorecard: Financial Perspective
Facilities Management Strategic Planning Session – First Quarter FY 2014

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

Lead: Facilities Operations
Balance Scorecard: Financial Perspective
Facilities Management Strategic Planning Session – First Quarter FY 2014

GOAL #5 – Promote Good Stewardship
Objective: 5.1: Promote Fiscal Responsibility
Tactic: 5.1.7: All Receipt Supported Funds Accounts have a positive balance at the end of the fiscal year
Measure: Dollars in account at end of fiscal year

Lead: Facilities Operations
Balance Scorecard: Financial Perspective

---

Goal to be positive at end of fiscal year
(*Data collected from FBO-Work Order Billing Report)
GOAL #5 – Promote Good Stewardship

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

**ACTIONS TO REDUCE CAMPUS ENERGY USAGE**

- Performance Contract in construction
  - Will reduce campus consumption by another 5 KBTU/GSF
- System Wide Lighting Performance Contract
- SAC Energy Upgrade
- Continue retro-commissioning program
- Energy efficient equipment upgrades
- Exterior Lighting upgrades to LED
Facilities Management Strategic Planning Session – 1st QTR FY 2014

GOAL #5 – Promote Good Stewardship

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

Measure: BTUs/GSF/Year consumed on campus

Balanced Scorecard Category: Financial Perspective

CAMPUS ENERGY USAGE
Kbtu/GSF

<table>
<thead>
<tr>
<th>Year</th>
<th>FY03</th>
<th>FY04</th>
<th>FY05</th>
<th>FY06</th>
<th>FY07</th>
<th>FY08</th>
<th>FY09</th>
<th>FY10</th>
<th>FY11</th>
<th>FY12</th>
<th>FY13</th>
<th>FY14</th>
<th>FY15 Goal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Usage (Kbtu/GSF)</td>
<td>124</td>
<td>111</td>
<td>117</td>
<td>120</td>
<td>125</td>
<td>120</td>
<td>124</td>
<td>117</td>
<td>113</td>
<td>109</td>
<td>93</td>
<td>88</td>
<td>87</td>
</tr>
</tbody>
</table>

Base Year FY 2003
Current Reduction 29%
Mandated Reduction 30%
BY FY 15
Facilities Management Strategic Planning Session – 1st QTR FY 2014

GOAL #5 – Promote Good Stewardship

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

Measure: BTUs/GSF/Year consumed on campus

Balanced Scorecard Category: Financial Perspective

CAMPUS MONTHLY ENERGY USAGE
Kbtu/GSF
GOAL #5 – Promote Good Stewardship

Strategy 5.3 Conserve Natural Resources
Objective 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 24 Gal/GSF
Facilities Management Strategic Planning Session – 1st QTR FY 2014

GOAL #5 – Promote Good Stewardship

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

Measure: Gallons/GSF/Year consumed on campus

Balanced Scorecard Category: Financial Perspective

Monthly Water Usage Comparison
GOAL #5 – Promote Good Stewardship

Objective 5.4 Improve Historically Underutilized Businesses (HUB) Participation

ACTION PLANS FOR IMPROVEMENT

Continue –

- Work with University staff/GCs/organizations, etc. to promote the utilization of HUB firms
- Identify HUB firms to participate in the process
- Encourage participation within all HUB designations
- Assist CM firms review 1st tier subcontractor *Good Faith Effort* documentation
- Ensure Program Compliance
- Education & Outreach
Facilities Management Strategic Planning Session – First Quarter FY2014

GOAL #5 – Promote Good Stewardship

Objective: 5.4: Improve Historically Underutilized Businesses (HUB) Participation
Tactic 5.4.1: 12% HUB participation on 80% of Capital Projects
Measure: Number of Individual Capital Projects achieving 12% HUB participation divided into Total Projects Completed
Lead: Capital Projects
Balanced Scorecard Category: Financial Perspective

HUB Participation
Capital Projects > $500K

Parking Deck J
Phase X
Phase XI
RUP IV
SV Roadway & Utilities

80% GOAL

Projects

FY2011 FY2012 FY2013 1st Qtr FY14

Total Projects Completed

Projects with 12% HUB Participation

70% 78% 100% 100%

0 2 4 6 8 10 12

STATUS
GOAL #5 – Promote Good Stewardship

Objective: 5.4: Improve Historically Underutilized Businesses (HUB) Participation
Tactic 5.4.2: 3% African American Participation on Capital Projects
Measure: Total Capital Dollars awarded to African American Contractors divided by Total Contract Dollars
Lead: Capital Projects
Balanced Scorecard Category: Financial Perspective
Facilities Management Strategic Planning Session – First Quarter FY2014

GOAL #5 – Promote Good Stewardship

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

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

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

Lead: Capital Projects

Balanced Scorecard Category: Financial Perspective
Facilities Management Strategic Planning Session – First Quarter FY 2014

GOAL #5 – Promote Good Stewardship

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

Lead: Design Services
 Balanced Scorecard Category: Internal Business Process

| Tactic 5.4.4: | 13% overall HUB participation on informal projects below $30,000 including 3% African American |
| Measurement: | 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 |
| Measurement: | Total African American contract dollars divided by Total Contract Dollars |

ACTION PLANS FOR IMPROVEMENT

- Design Services’ HUB participation improvement emphasizing African American contractors & vendors:
  - Process Improvement: 4. Increase African American HUB usage

IMPLEMENTED ACTIONS AND PLANS

- Amanda Caudle is Design Services’ contact and coordinator working 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. This is a coordinated effort and is regularly reviewed and discussed at our Design Services Tuesday morning meetings. 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 – First Quarter FY 2014

GOAL #5 – Promote Good Stewardship

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

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

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

Lead: Design Services

Balanced Scorecard Category: Financial Perspective

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

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

QTR 1 $724,890 $203,778 28.1%
QTR 2 $ - $ - 0.0%
QTR 3 $ - $ - 0.0%
QTR 4 $ - $ - 0.0%

FY '14 STATUS $724,890 $203,778 28.1%
Facilities Management Strategic Planning Session – First Quarter FY 2014

GOAL #5 – Promote Good Stewardship

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

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

Lead: Design Services

Balanced Scorecard Category: Financial Perspective

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

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

| QTR 1            | $724,890                      | $42,900.00               | 5.9%             |
| QTR 2            | $                            | $                        | 0.0%             |
| QTR 3            | $                            | $                        | 0.0%             |
| QTR 4            | $                            | $                        | 0.0%             |

FY '14 STATUS: $724,890 $42,900 5.9%
## Balance Score Card

### DISCUSSION

### FINANCIAL PERSPECTIVE

<table>
<thead>
<tr>
<th>Objective</th>
<th>Tactic</th>
<th>Lag Measures/Lead Measures</th>
<th>Target</th>
<th>Actual</th>
<th>1st Quarter</th>
</tr>
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<tbody>
<tr>
<td>Promote Fiscal Responsibility</td>
<td>5.1.1</td>
<td>100% of Financial Accounts within Budget</td>
<td>100%</td>
<td>?</td>
<td></td>
</tr>
<tr>
<td></td>
<td>5.1.2</td>
<td>Increase Supplemental Funding to Dept by 10% Annually</td>
<td>10%</td>
<td>0%</td>
<td>Annual</td>
</tr>
<tr>
<td></td>
<td>5.1.3</td>
<td>Admin Cost/GSF + 5% APPA Avg for Peer Institutions</td>
<td>+/-5%</td>
<td>?</td>
<td>Annual</td>
</tr>
<tr>
<td></td>
<td>5.1.4</td>
<td>Custodial Costs/Student + 5% APPA Avg for Peer Institutions</td>
<td>+/-5%</td>
<td>6.1%</td>
<td>Annual</td>
</tr>
<tr>
<td></td>
<td>5.1.5</td>
<td>Maint Cost/GSF + 5% APPA Avg for Peer Institutions</td>
<td>+/-5%</td>
<td>?</td>
<td>Annual</td>
</tr>
<tr>
<td></td>
<td>5.1.6</td>
<td>Landscape Cost/Acre + 5% APPA Avg for Peer Institutions</td>
<td>+/-5%</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>5.1.7</td>
<td>All Receipt Supported Funds Accounts Have Positive Balance</td>
<td>+</td>
<td>$588,972.00</td>
<td>Annual</td>
</tr>
<tr>
<td>Conserve Natural Resources</td>
<td>5.3.1</td>
<td>Decrease Energy Usage by 30% by FY15</td>
<td>30%</td>
<td>29%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>5.3.2</td>
<td>Decrease Water Usage by 10% (goal 43 gal/GSF met for FY15)</td>
<td>10%</td>
<td>48%</td>
<td></td>
</tr>
<tr>
<td>Improve HUB Participation</td>
<td>5.4.1</td>
<td>12% HUB participation on 80% of Capital Projects</td>
<td>12% on 80%</td>
<td>100%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>5.4.2</td>
<td>3% African American Participation on Capital Projects</td>
<td>3%</td>
<td>3.5%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>5.4.3</td>
<td>15% HUB Participation on Informal Contracts &gt;= $30K</td>
<td>15%</td>
<td>44%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>5.4.4</td>
<td>13% HUB Participation on Informal Projects &lt;$30K</td>
<td>13%</td>
<td>28.1%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>5.4.5</td>
<td>3% African American Participation on Informal Projects &lt;$30K</td>
<td>3%</td>
<td>5.9%</td>
<td></td>
</tr>
</tbody>
</table>
Balance Score Card

INTERNAL PROCESSES Perspective

Objectives:
- Labor Availability
- Logistics Efficiency
- Facility Systems Reliability
- Facilities Management Effectiveness
- Capital Renewal
- Space Planning & Utilization
- Capital Planning & Design
- Master/Project Planning Process
- Real Estate
GOAL #1 – Continuously Improve Operations of Campus Facilities
Objective: 1.1: Improve Labor Availability
Tactic: 1.1.1: Increase “Wrench” Time to 70%

ACTION PLAN

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
Facilities Management Strategic Planning Session – First Quarter FY 2014

GOAL #1 – Continuously Improve Operations of Campus Facilities
Objective: 1.1: Improve Labor Availability
Tactic: 1.1.1: Increase “Wrench” Time to 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

75.0%

Goal - Increase Wrench Time to 70%
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**

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.
5 – Implement SDI Punch-out, train staff and aggressively push it’s use.
Facilities Management Strategic Planning Session – First Quarter FY 2014

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

Lead: Facilities Operations
Balance Scorecard Category: Internal Business Process

![Graph showing Improve Non-stock On-time Delivery improvement with 97.00% for 1st Qtr FY14 and goal to 95%]

Lead F. O.

STATUS
Facilities Management Strategic Planning Session – First Quarter FY 2014

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.2: Improve Logistics Efficiency

Tactic: 1.2.2: Reduce Average Non-stock Requisition to Receipt Time to 3.5 Days

Measure: Average Days from requisition to receipt (SDI KPI – Non-stock Requisition to Receipt Time)

Lead: Facilities Operations

Balance Scorecard Category: Internal Business Process

Receipt Time

Goal 3.5 days

1st Qtr FY14
GOAL #1 – Continuously Improve Operation of Campus Facilities

Objective: 1.5: Improve Facility Systems Reliability

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

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

**ACTION PLAN**

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.
5. Review system projects identified on the R&R list and prioritize. Indicate urgency and recommend future funding dates.
GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.5: Improve Facility Systems Reliability

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

Measure: Percentage of Preventive Maintenance Work Requests Completed (Completed divided by Total Completed + Cancelled + Rejected)

Lead: Facilities Operations

Balance Scorecard Category: Internal Business Process

Archibus Report
In error
Working w/FIS
Facilities Management Strategic Planning Session – First Quarter FY 2014

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

Lead: Facilities Operations
Balance Scorecard Category: Internal Business Process

Unscheduled Equipment Replacement Projects

![Graph showing Unscheduled Equipment Replacement Projects with status and average](image)
FM Prioritized Projects – FY14

1. ARCHIBUS Upgrade – Initial System Updates Completed; User Views/Reports Fixes In Process
2. Space GA Reports – In Process
3. Space Data Clean Up – Not Started
4. Design & FBO Enhancements – Not Started
5. FM Surveys – Not Started
6. ImageNOW Document Management – Pre-Requirements for FM Depts Completed
7. Real Estate Module – Initial Meeting
8. Facilities Condition Assessment Program (FCAP) – Funding Approved
9. CRDM Enhancements – In Process
10. FBO Accounting Upgrades – Not Started
11. Lock Shop Enterprise Data Assistant (EDA) – In Process
12. BES Enterprise Data Assistant (EDA) Asset Management - In Process
13. BAS LDAP Upgrade & Security Enhancements – Waiting on Funding Approval
14. ARCHIBUS Key Management – Not Started
15. WO Hot Work Permit Form/Utility – Not Started
16. Campus Map Portal – Not Started

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GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

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

ACTION PLAN

Actions Completed:
1. FY14 FIS Project Prioritization & Approval Completed w/ Directors
2. ARCHIBUS 21.1 User and Internal Testing, System Upgrade & Many Major Issue Resolution Completed
3. Initial Kick off meetings conducted for CRDM, Real Estate and Space Enhancements
4. Initial EDA distribution for BES and Lock Shop. Large amount of BES Equipment Barcoded.

Actions Planned:
1. Complete CRDM Enhancements for Architectural Planning
2. Complete Space GA Reports
3. Complete ARCHIBUS Report Upgrades and additional reported upgrade issues
5. Complete Real Estate requirements gathering.
Facilities Management Strategic Planning Session – First Quarter FY 2014

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

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

Measure: Percent Completion of Five-Year Technology Projects

Based upon Cumulative Average of Project Completion

**Balanced Scorecard Category:** Internal Business Processes

---

**Cumulative Project Average**

**Baseline Metric**

- **Qtr 1 FY14:** 12.00%
- **Qtr 2 FY14:** 25.00%
- **Qtr 3 FY14:** 12.00%
- **Qtr 4 FY14:** 12.00%
Facilities Management Strategic Planning Session – First Quarter FY 2014

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

Balanced Scorecard Category: Internal Business Processes

<table>
<thead>
<tr>
<th>Balanced Scorecard Category</th>
<th>Internal Business Processes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Objective</td>
<td>Maximize Facilities Management Effectiveness and Efficiency through Information Technology</td>
</tr>
<tr>
<td>Tactic</td>
<td>Complete 40% of the Facilities Management Five-Year Technology Plan</td>
</tr>
<tr>
<td>Measure</td>
<td>Percent Completion of Five-Year Technology Projects</td>
</tr>
<tr>
<td>Lead FIS</td>
<td>FIS</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Balanced Scorecard Category</th>
<th>FY14 Q4</th>
<th>FY14 Q3</th>
<th>FY14 Q2</th>
<th>FY14 Q1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percent Completion Completion Percentage</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7.00%</td>
<td>10.00%</td>
<td>5.00%</td>
<td>15.00%</td>
<td>15.00%</td>
</tr>
</tbody>
</table>

STATUS
Facilities Management Strategic Planning Session – First Quarter FY 2014

GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure

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

Tactic 2.3.1: Improve the Facilities Condition Index (FCI) for buildings on campus by 5% NLT end of FY 15.

Measure: Average Building FCI for campus

ACTION PLAN

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

GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure

Objective 2.3: Develop a Comprehensive Capital Renewal/Deferred Maintenance (CRDM) Program
Tactic 2.3.1: Improve the Facilities Condition Index (FCI) for buildings on campus by 5% NLT end of FY 15.
Measure: Average Building FCI for campus

Lead: Facilities Planning
Balanced Scorecard Category: Internal Business Process

Percentage of Completion

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Completion</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Qtr FY 14</td>
<td>TBD</td>
</tr>
<tr>
<td>2nd Qtr FY 14</td>
<td>0.5</td>
</tr>
<tr>
<td>3rd Qtr FY 14</td>
<td>0.5</td>
</tr>
<tr>
<td>4th Qtr FY 14</td>
<td>0.5</td>
</tr>
</tbody>
</table>
Facilities Management Strategic Planning Session – First Quarter FY 2014

GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure

Objective 2.4: Improve Campus Space Planning and Utilization

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

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

Lead: Facilities Planning

Balanced Scorecard Category: Internal Business Process

ACTION PLAN

• Actions Planned:
  o To educate the campus that there is not a “System Wide Standard” so users need to “Reference UNC Charlotte Approved Standard.”
  o Complete space allocations/inventory by room category in Archibus
  o Compare inventory to standard and report % difference.
  o Recommend a plan/prioritize projects to improve allocations to within 5% of the standard by end of FY 2015.
Facilities Management Strategic Planning Session – First Quarter FY 2014

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective 2.4: Improve Campus Space Planning and Utilization

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

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

Lead: Facilities Planning

Balanced Scorecard Category: Internal Business Process
Facilities Management Strategic Planning Session – First Quarter FY 2014

GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure

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

Lead: Facilities Planning
Balanced Scorecard Category: Internal Business Process

**ACTION PLAN**

- Actions Planned:
  - Sustain current process of completing Operating Budget sheets for new projects
  - Support Capital, when required, with further study related to funding (e.g. Football, South Village, etc. work)
### GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

<table>
<thead>
<tr>
<th>Objective</th>
<th>2.5</th>
<th>Improve the Capital Planning and Design Process</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tactic</td>
<td>2.5.2</td>
<td>90% of designers under contract within 120 days of the Project posting in CAPSTAT</td>
</tr>
</tbody>
</table>

**ACTION PLAN**

- **Actions Completed**
  - Modular Office (94 days).
  - Residence Hall Phase XIV (133 days).

- **Actions Planned**
  1. Baseline Schedules – Accurate
  2. Baseline Schedules – Refer to them
  3. Push Designers to stay on schedule.
Facilities Management Strategic Planning Session – First Quarter FY 2014

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

Balanced Scorecard Category: Internal Business Process

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

Tactic Measurement for 1st Quarter is 50%
Year to date is 50%
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

ACTION PLAN

• Actions Completed
  RUP 1 Backup Generator

• Actions Planned
  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.)
Facilities Management Strategic Planning Session – First Quarter FY 2014

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

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

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

**Balanced Scorecard Category:** Internal Business Process

---

**STRATEGIC REVIEW by Fiscal Year (July-June)**

<table>
<thead>
<tr>
<th></th>
<th>No. of projects completed by scheduled time</th>
<th>#not completed by scheduled time</th>
<th>%Designs complete by completion time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summary FY-13</td>
<td>3</td>
<td>1</td>
<td>75%</td>
</tr>
<tr>
<td>1st Qtr. FY-14</td>
<td>1</td>
<td>0</td>
<td>100%</td>
</tr>
</tbody>
</table>

Tactic Measurement for 1st Quarter is 100%
Year to date is 100%
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

**ACTION PLAN**

• Actions Completed
  - RUP 1 Backup Generator

• Actions Planned
  1. Print project budget / financial sheets & share with end users
  3. Protect contingency
  4. Know project authorization
Facilities Management Strategic Planning Session – First Quarter FY 2014

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective 2.5 Improve the Capital Planning and Design Process
Tactic 2.5.4 90% of designs complete within design budgeted fee

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

Balanced Scorecard Category: Internal Processes

<table>
<thead>
<tr>
<th>Projects</th>
<th>OC25</th>
<th>Initial Contract</th>
<th>Final/Current Contract</th>
<th>Percent Difference Between OC25 &amp; Initial Contract</th>
<th>Percent Difference Between Initial &amp; Final Contract</th>
<th>Completed Within Design Budget (1=yes, 0=no)</th>
</tr>
</thead>
<tbody>
<tr>
<td>PORTAL</td>
<td>$2,466,950</td>
<td>$2,200,000</td>
<td>$2,200,000</td>
<td>-10.8%</td>
<td>0.0%</td>
<td>1</td>
</tr>
<tr>
<td>RDH Renovation</td>
<td>$1,742,048</td>
<td>$1,981,410</td>
<td>$1,987,410</td>
<td>13.7%</td>
<td>0.3%</td>
<td>0</td>
</tr>
<tr>
<td>Res. Hall Ph XII</td>
<td>$3,400,667</td>
<td>$2,733,245</td>
<td>$2,778,245</td>
<td>-19.6%</td>
<td>1.6%</td>
<td>0</td>
</tr>
<tr>
<td>Res. Hall Ph XIII</td>
<td>$3,081,868</td>
<td>$2,188,800</td>
<td>$2,188,800</td>
<td>-29.0%</td>
<td>0.0%</td>
<td>1</td>
</tr>
<tr>
<td>Res. Hall Ph XIV</td>
<td>$2,641,144</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>RUP IV</td>
<td></td>
<td>$385,000</td>
<td>$495,998</td>
<td>0.0%</td>
<td>28.8%</td>
<td>1</td>
</tr>
<tr>
<td>Modular Office Bldg</td>
<td>$60,440</td>
<td>$72,620</td>
<td>$72,620</td>
<td>20.2%</td>
<td>0.0%</td>
<td></td>
</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>
<td>1</td>
</tr>
<tr>
<td>Elm, Pine &amp; Maple Renov</td>
<td>$908,068</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Holshouser Hall Renov</td>
<td>$1,039,730</td>
<td>$1,165,000</td>
<td>$1,165,000</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sanford Hall Renov</td>
<td>$3,081,868</td>
<td>$2,188,800</td>
<td>$2,188,800</td>
<td>-29.0%</td>
<td>0.0%</td>
<td>1</td>
</tr>
<tr>
<td>Colvard Renov</td>
<td>$153,117</td>
<td>$243,070</td>
<td>$243,070</td>
<td>58.7%</td>
<td>0.0%</td>
<td>1</td>
</tr>
<tr>
<td>Kennedy 2nd fl Renov</td>
<td>$104,127</td>
<td>$104,127</td>
<td>$104,127</td>
<td>0.0%</td>
<td>0.0%</td>
<td>1</td>
</tr>
</tbody>
</table>

Tactic Measurement is 77%

*Factors in budget fee changes: Owner changes scope, owner adds more scope, ADA compliances.*
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective 2.6 Improve the Capital Construction Process
Tactic 2.6.2 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

• 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.
Facilities Management Strategic Planning Session – First Quarter FY 2014

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

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

Balanced Scorecard Category: Internal Business Process

Tactic is currently at 83%. Goal is 95%

*Factors in contract $$ changes could include: Owner changes in construction, unforeseen conditions, design omissions.
Facilities Management Strategic Planning Session – First Quarter FY 2014

GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure

Objective 2.8: Develop a comprehensive plan for strategic real estate acquisition

Balanced Scorecard Category: Internal Business Process

(Purchase) ACTION PLAN

• Continue to work with Business Affairs and the Cabinet to establish Funds to acquire real estate
• Activate Strategic Acquisition Subcommittee within the Property Review Committee (PRC)
• Determine strategic acquisitions
Facilities Management Strategic Planning Session – First Quarter FY 2014

GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure

Objective 2.8: Develop a comprehensive plan for strategic real estate acquisition (by Lease)

Balanced Scorecard Category: Internal Business Process

(Lease) ACTION PLAN

• Develop Lease Policy
• Incorporate Leasing Policy with Space Management Advisory Committee (SMAC)
• Revise request for Delegated Authority
• Work with the Chancellor’s office to formalize the appointment of the Property Review Committee
• Modify Lease Request form
• Update Real Estate Procedures Manual
• Utilize the Property Review Committee to Govern Leasing requests
Facilities Management Strategic Planning Session – First Quarter FY 2014

GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure

Objective 2.9: Develop a plan for 102 acres on Mallard Creek Church Road

Balanced Scorecard Category: Internal Business Process

ACTION PLAN

- Too Early to report:
Balance Score Card

DISCUSSION

INTERNAL PROCESSES PERSPECTIVE

<table>
<thead>
<tr>
<th>Area</th>
<th>Objective</th>
<th>Target 1 (%)</th>
<th>Target 2 (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improve Labor Availability</td>
<td>Increase &quot;Wrench&quot; Time</td>
<td>70%</td>
<td>75%</td>
</tr>
<tr>
<td>Improve Logistics Efficiency</td>
<td>Improve Non-stock on-time delivery</td>
<td>95%</td>
<td>97%</td>
</tr>
<tr>
<td></td>
<td>Reduce Average Non-Stock Requisition to Receipt Time</td>
<td>3.5 days</td>
<td>3.88</td>
</tr>
<tr>
<td>Facility Systems Reliability</td>
<td>Improve Completion of PM Work Requests</td>
<td>90%</td>
<td>Report Error</td>
</tr>
<tr>
<td></td>
<td>Decrease Unscheduled Equipment Replacement Projects</td>
<td>&lt;2</td>
<td>4</td>
</tr>
<tr>
<td>Maximize FM Effectiveness</td>
<td>Complete 40% of FM Five Year Technology Plan</td>
<td>40%</td>
<td>12%</td>
</tr>
<tr>
<td>Develop CRDM Program</td>
<td>Improve Facilities Condition Index by 5%</td>
<td>5%</td>
<td>TBD</td>
</tr>
<tr>
<td>Space Planning &amp; Utilization</td>
<td>80% of Dept/Colleges within +/- 5% of System-wide Standards</td>
<td>80%</td>
<td>TBD</td>
</tr>
<tr>
<td>Capital Planning &amp; Design</td>
<td>Develop Lifecyle cost analysis &amp; funding process for capital projects</td>
<td>Action Plan Only</td>
<td>✓</td>
</tr>
<tr>
<td></td>
<td>90% of Designers Under Contract w/n 120 days</td>
<td>90%</td>
<td>50%</td>
</tr>
<tr>
<td></td>
<td>Date</td>
<td>90%</td>
<td>100%</td>
</tr>
<tr>
<td></td>
<td>90% of Designs Complete w/n Design Budgeted Fee</td>
<td>90%</td>
<td>77%</td>
</tr>
<tr>
<td>Capital Construction Process</td>
<td>95% Completed w/n Original Construction Amt or CMP plus 3% new or 5% renovation</td>
<td>95%</td>
<td>83%</td>
</tr>
<tr>
<td>Execute Master Plan Phase I</td>
<td>80% of Capital Projects detailed in Phase I of MP</td>
<td>80%</td>
<td>In progress</td>
</tr>
<tr>
<td>Strategic Real Estate</td>
<td>Develop Comprehensive Plan for Strategic RE</td>
<td>Action Plan Only</td>
<td>✓</td>
</tr>
<tr>
<td>Plan for Mallard Creek Ch. Rd</td>
<td>Develop Plan for 102 acres on Mallard Creek Ch Rd</td>
<td>Action Plan Only</td>
<td>N/A</td>
</tr>
</tbody>
</table>
GOAL #4  Recruit, Develop and Retain Quality Employees

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

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

ACTION PLAN

• Continue to review vacancy report and monitor process to ensure positions do not reach the 6 months abolishment threshold.
• Increase applicant pool by expanding advertisement mediums.
• Monitor timeframe from referral of applicants to hiring managers to ensure review and interview within a timely manner.
• Ensure every hiring manager uses the targeted selection method.
• Establish baseline data for 4.1.2 regarding terminations during probationary period.
Facilities Management Strategic Planning Session – First Quarter FY 2014

GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.1:  Recruit a Qualified Workforce in a Timely Fashion
Tactic 4.1.1:  Vacancy time of no longer than 80 calendar days – Nonexempt
              Vacancy time of no longer than 120 calendar days - Exempt
Measure:  Days needed to fill vacant positions

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

Average Number of Days to Fill Non-exempt Vacancies
Facilities Management Strategic Planning Session – First Quarter FY 2014

GOAL #4  Recruit, Develop and Retain Quality Employees

Objective 4.1:  Recruit a Qualified Workforce in a Timely Fashion
Tactic 4.1.1:  Vacancy time of no longer than 80 calendar days – Nonexempt
               Vacancy time of no longer than 120 calendar days - Exempt
Measure:  Days needed to fill vacant positions

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

![Average Number of Days to Fill Exempt (Salaried) Vacancies](chart.png)
Facilities Management Strategic Planning Session – First Quarter FY 2014

GOAL #4  Recruit, Develop and Retain Quality Employees

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

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

Employee's Separated during FY 14, Qtr 1

<table>
<thead>
<tr>
<th>Type</th>
<th># of Separations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retirement</td>
<td>3</td>
</tr>
<tr>
<td>Involuntary</td>
<td>1</td>
</tr>
<tr>
<td>Resignation</td>
<td>9</td>
</tr>
<tr>
<td>Involuntary During Probation</td>
<td>1</td>
</tr>
</tbody>
</table>

5% of 14 is .7
Facilities Management Strategic Planning Session – First Quarter FY 2014

GOAL #4  Recruit, Develop and Retain Quality Employees

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

**ACTION PLAN**

- Increased communication efforts to capture all training activities (i.e., mandatory, elective, compliance, on/off site)
- Second “on-site” technical training scheduled in December 2013 with a third session planned for January/February 2014.
  - Workshop Topics → *Pump Repair & Maintenance* and *PLCs for Non-programmers*
- *New* – Training Mini-Series partnering with Laurie McDermott (Grainger)
  - Session Topics → *LED lighting* and *FIRE STOP*
- Hosting our second SRAPPA Supervisor Toolkit workshop in March 2014
- *Supervisor Safety Talks* – ongoing, one topic per month
Facilities Management Strategic Planning Session – First Quarter FY 2014

GOAL #4 Recruit, Develop and Retain Quality Employees

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

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

FY 14

Training Hours for Supervisors & Managers by Quarter

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

Fiscal 2014 Results:
Target - 1,960 hrs
Actual YTD 127.75 hrs (6.5%)
Facilities Management Strategic Planning Session – First Quarter FY 2014

GOAL #4 Recruit, Develop and Retain Quality Employees

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

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

FY 14
Training Hours for front line employees by Quarter

Training Hours by QTR
YTD Training Hours

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

Fiscal 2014 Results:
Target- 7,760 hrs
Actual YTD
1263.25 hrs (16.3%)
Facilities Management Strategic Planning Session – First Quarter FY 2014

GOAL #4  Recruit, Develop and Retain Quality Employees

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

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

ACTION PLAN

- Ongoing safety oriented activities to maintain continuous awareness
  - Supervisor Safety Talks
  - FM Safety Fair
  - Safety Slogan Contest

- Accident/Incident status as of Oct 24, 2013
  - Accidents down 47% YTD from 2012
  - Minor incidents down 75% YTD from 2012
Facilities Management Strategic Planning Session – First Quarter FY 2014

GOAL #4  Recruit, Develop and Retain Quality Employees

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

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

Accident Trends

<table>
<thead>
<tr>
<th>Year</th>
<th>Accidents (Long Form)</th>
<th>First Aid Only</th>
</tr>
</thead>
<tbody>
<tr>
<td>2001</td>
<td>65</td>
<td></td>
</tr>
<tr>
<td>2002</td>
<td>45</td>
<td></td>
</tr>
<tr>
<td>2003</td>
<td>30</td>
<td></td>
</tr>
<tr>
<td>2004</td>
<td>45</td>
<td></td>
</tr>
<tr>
<td>2005</td>
<td>37</td>
<td>7</td>
</tr>
<tr>
<td>2006</td>
<td>40</td>
<td>6</td>
</tr>
<tr>
<td>2007</td>
<td>28</td>
<td>4</td>
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<tr>
<td>2008</td>
<td>26</td>
<td>2</td>
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<tr>
<td>2009</td>
<td>24</td>
<td>0</td>
</tr>
<tr>
<td>2010</td>
<td>17</td>
<td>1</td>
</tr>
<tr>
<td>2011</td>
<td>24</td>
<td>5</td>
</tr>
<tr>
<td>2012</td>
<td>19</td>
<td>7</td>
</tr>
<tr>
<td>2013</td>
<td>11</td>
<td>9</td>
</tr>
</tbody>
</table>

Target <=15
Facilities Management Strategic Planning Session – First Quarter FY 2014

GOAL #4 Recruit, Develop and Retain Quality Employees

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

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

UNDER REVIEW
Facilities Management Strategic Planning Session – First Quarter FY 2014

GOAL #4  Recruit, Develop and Retain Quality Employees

Objective 4.5: Improve Workforce Performance (Action Plan Only)

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

ACTION PLAN

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

• HVAC Matrix Development – meet with FO Leadership on Tuesday, October 29 to discuss buy-in and plan “development kickoff” for this next phase.
GOAL #5 – Promote Good Stewardship

Objective 5.2  Develop a Sustainable Campus

ACTION PLAN

• Waste Reduction and Recycling
  – Actions Complete -

  TOTAL recycling for quarter 24% (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
  • Coordinated recycling at MOVE IN and I Fest, provided tours and presentations across campus, conducted waste audits for campus to determine amount of recyclables in waste stream, designed Zero Waste Options for FOOTBALL,
  • After 5 home football games, Zero Waste program is a success: overall diversion rate is 83.5%. Percentage has increased each game – October 12 game had a 93.9% diversion rate.
  – 2nd Quarter Actions Planned
    • October 31st Fall Campus Clean UP and Tree Planting and week of events
    • Continue to conduct Waste audits for campus to determine amount of recyclables in waste stream
    • Continue zero waste efforts at final football game; begin working on changes and adjustments for next season.

• C & D
  – Actions Complete -

  • Overall C&D recycling rate for Capital Projects is 90%; recycling rate for informal projects is 52%.
  – 2nd Quarter Actions Planned
    • Continue collecting/tracking recycling information and acting as resource for contractors.
Facilities Management Strategic Planning Session – First Quarter FY 2014

GOAL #5 – Promote Good Stewardship

Objective 5.2  Develop a Sustainable Campus
Tactic 5.2.1  Increase Recycling of Construction and Demolition Materials on Capital Projects to 80% of Total C&D Waste

Measure:  Pounds of C & D waste recycled divided by total pounds of C & D waste

Balanced Scorecard Category:  Innovation and Learning Perspective

Construction & Demolition Debris Diversion
Capital Projects

- 69.6% diversion in FY 13 Total
- 90.0% diversion in 1st Qtr 14

Graph showing tons landfilled vs. tons recycled for FY 13 and 1st Qtr 14.
Facilities Management Strategic Planning Session – First Quarter FY 2014

GOAL #5 – Promote Good Stewardship

Objective 5.2 Develop a Sustainable Campus
Tactic 5.2.2 Increase Percent of Solid Waste diversion on Campus to 45% by 2018
Measure: Pounds of solid waste recycled, composted and reused annually divided by total solid waste

Balanced Scorecard Category: Innovation and Learning Perspective

Breakdown of Solid Waste

<table>
<thead>
<tr>
<th>Period</th>
<th>Series 2</th>
<th>Series 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>2nd Qtr FY13</td>
<td>732 tons</td>
<td>262 tons</td>
</tr>
<tr>
<td>3rd Qtr FY13</td>
<td>775 tons</td>
<td>269 tons</td>
</tr>
<tr>
<td>4th Qtr FY13</td>
<td>798 tons</td>
<td>313 tons</td>
</tr>
<tr>
<td>1st Qtr FY14</td>
<td>634 tons</td>
<td>152 tons</td>
</tr>
</tbody>
</table>

Baseline 4th Qtr FY08: 695 tons

Series2 | Series1
Facilities Management Strategic Planning Session – First Quarter FY 2014

GOAL #5 – Promote Good Stewardship

Objective: 5.2: Develop a Sustainable Campus

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

Measure: STARS points to achieve bronze rating

Lead: Facilities Planning

Balanced Scorecard Category: Innovation and Learning Perspective

ACTION PLAN

- Actions Planned:
  - Inventory STARS points and determine current #.
  - Determine areas in which we can obtain further credits.
  - Draft an implementation plan intended to gather further credits based; most feasible first, with estimates.
  - Achieve bronze rating by end of FY 15.
Facilities Management Strategic Planning Session – First Quarter FY 2014

GOAL #5 – Promote Good Stewardship

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

Lead: Facilities Planning
Balanced Scorecard Category: Innovation and Learning Perspective
Facilities Management Strategic Planning Session – First Quarter FY 2014

GOAL #5 – Promote Good Stewardship

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

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

ACTION PLAN

• Actions Planned:
  o Review Climate Action and Sustainability Plans with recommendations for amendments/ revisions as required.
  o Generate list of best practices and identify milestones for implementation.
  o Draft an implementation plan proposing short term (</= 5 yr.); most feasible first, with estimates.
  o Propose plan and estimate of probable costs to implement 60% of best practices.
Facilities Management Strategic Planning Session – First Quarter FY 2014

GOAL #5 – Promote Good Stewardship

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

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

Percentage of Completion

<table>
<thead>
<tr>
<th>Best Practices</th>
<th>1st Qtr FY 14</th>
<th>2nd Qtr FY 14</th>
<th>3rd Qtr FY 14</th>
<th>4th Qtr FY 14</th>
</tr>
</thead>
<tbody>
<tr>
<td>TBD</td>
<td>.6</td>
<td>.5</td>
<td>.4</td>
<td>.3</td>
</tr>
</tbody>
</table>
## Balance Score Card

### DISCUSSION

### INNOVATION & LEARNING

#### PERSPECTIVE

<table>
<thead>
<tr>
<th>Area</th>
<th>Objectives</th>
<th>Targets/Action Plan</th>
<th>Status/Action Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Recruit Qualified Workforce</strong></td>
<td><strong>4.1.1</strong> Vacancy Time &lt;=80 days (nonexempt); &lt;=120 (exempt) 80 days/120 days 95/86</td>
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<tr>
<td></td>
<td><strong>4.1.2</strong> Reduce Number of Employees Terminated During Probation Period &lt;5%</td>
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<tr>
<td><strong>Improve Workforce Development</strong></td>
<td><strong>4.2.1</strong> Increase Supervisor/Mgr Training to 40 Hour per Year 1960 hours 127.75 Annual</td>
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<tr>
<td></td>
<td><strong>4.2.2</strong> Increase Employees Training to 20 Hours per Year 7760 hours 1263.25 Annual</td>
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<tr>
<td><strong>Improve Employee Safety</strong></td>
<td><strong>4.4.1</strong> Reduce Number of Reportable Accidents by 20% Annually 15</td>
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<tr>
<td></td>
<td><strong>4.4.2</strong> 98% Mandatory Compliance Training Completed Annually 98% Under review</td>
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<tr>
<td><strong>Improve Workforce Performance</strong></td>
<td><strong>4.5</strong> Improve Workforce Performance Action Plan Only ☑</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Develop a Sustainable Campus</strong></td>
<td><strong>5.2.1</strong> Increase Recycling of Construction &amp; Demo Materials 80 80% 90% Annual</td>
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</tr>
<tr>
<td></td>
<td><strong>5.2.2</strong> Increase Percent of Solid Waste Diversion to 45% 45% 24%</td>
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<tr>
<td></td>
<td><strong>5.2.3</strong> Achieve Bronze Rating on S.T.A.R.S. ? TBD</td>
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<tr>
<td></td>
<td><strong>5.2.4</strong> Implement 60% of Campus Sustainability Plan Best Practices 60% 40% Annual</td>
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</tbody>
</table>