Facilities Management
Quarterly Strategic Planning Session
January 30, 2015

Second Quarter – Fiscal Year 2015
October - December 2014

AGENDA
Three Facilities Challenges: A Status Report – Phil Jones

Campus Interactive Map – Fred Brillante

Strategic Planning Metrics and Actions Plans

Special Presentation: Department Demographics – Melanie Witherspoon

Employee Satisfaction Survey Action Plans

Look Ahead – Phil Jones

…Creating a Campus of Distinction
Strategic Planning Session

Second Quarter – Fiscal Year 2015
October – December 2014

Facilities Management’s Goals

Goal 1 - Continuously Improve Operation of Campus Facilities
Goal 2 - Create a Reliable and Sustainable Physical Infrastructure
Goal 3 - Foster a Customer Focused Organization
Goal 4 - Recruit, Develop, and Retain Quality Employees
Goal 5 - Promote Good Stewardship

...Creating a Campus of Distinction
GOAL #1

Continuously Improve Operations of Campus

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

-- Harold Geneen, industrialist
Facilities Management Strategic Planning Session – Second Quarter FY 2015

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

**ACTION PLAN**

**Actions Planned**

1 – December 2014; Daily assignment, coordinating and monitoring of work effort
2 – December 2014; assignment of lead technician in absence of supervisor
3 – All levels of leadership “Manage by Walking around”
GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.1: Improve Labor Availability

Tactic: 1.1.1: Maintain “Wrench” Time at 70%

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

Lead: Facilities Operations

Balanced Scorecard Category: Internal Business Process

Wrench Time

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Wrench Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Qtr FY15</td>
<td>81.5%</td>
</tr>
<tr>
<td>2nd Qtr FY15</td>
<td>77.8%</td>
</tr>
<tr>
<td>3rd Qtr FY15</td>
<td>0.0%</td>
</tr>
<tr>
<td>4th Qtr FY15</td>
<td>0.0%</td>
</tr>
</tbody>
</table>

Goal: Maintain Wrench Time at 70%
Facilities Management Strategic Planning Session – Second Quarter FY 2015

GOAL #1 – Continuously Improve Operations of Campus Facilities
Objective: 1.2: Improve Logistics Efficiency
Tactic: 1.2.1: Improve Non-stock on-time delivery to 95%
Tactic: 1.2.2: Reduce Average Non-stock Requisition to Receipt Time to 3.5 Days

ACTION PLAN

Actions Planned

1 – Weekly review of 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 – Send out daily email reminders for approvers (Supervisors, Admins and Managers)

4 - Monitor the req to PO processing time and discuss weekly.

Actions Completed

1 - Promote the use of SDI Punch-out; conduct lunch and learn July 2014.
Facilities Management Strategic Planning Session – Second Quarter FY 2015

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

![Graph showing the reduction of average non-stock requisition to receipt time from quarters 1 to 4 of FY 2015. The goal is 3.5 days, with the actuals shown as follows:
- 1st Qtr FY15: 4.47 days
- 2nd Qtr FY15: 5.35 days
- 3rd Qtr FY15: 4.47 days
- 4th Qtr FY15: 4.5 days

The graph indicates the status of the goal for each quarter.](image-url)
Facilities Management Strategic Planning Session – Second Quarter FY 2015

GOAL #1 – Continuously Improve Operations of Campus Facilities
Objective: 1.3: Improve Work Request Process
Tactic: 1.3.1: Decrease Number of Work Orders Over 14 Days Old by 15%
Tactic: 1.3.2: Decrease Work Request Cycle Time by 10%
Measure: Hours from Work Request Submitted to Work Complete (APPA Benchmark)

**ACTION PLAN**

**Actions Planned**
1. Review of recurring services and scheduled services currently being completed using PM work request – Aug 2014
2. Emphasize Facilities Operations OP-16 Timely and Accurate Handling/Processing of WRs.
3. Weekly meeting with UPA and Managers to monitor 14 day report.
4. Communicate work order priorities (Quarterly Customer, Building Liaison and specific College Meetings); implemented July 2014
Facilities Management Strategic Planning Session – Second Quarter FY 2015

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

Number of Work Orders Over 14 Days

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Number of Work Orders</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Qtr FY15</td>
<td>862</td>
</tr>
<tr>
<td>2nd Qtr FY15</td>
<td>953</td>
</tr>
<tr>
<td>3rd Qtr FY15</td>
<td></td>
</tr>
<tr>
<td>4th Qtr FY15</td>
<td></td>
</tr>
</tbody>
</table>

Goal equals <15% (1232)
Facilities Management Strategic Planning Session – Second Quarter FY 2015

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

Lead: Facilities Operations
Balance Scorecard Category: Customer Perspective

Decrease Work Request Cycle Time

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Measure (Hours)</th>
<th>Goal &lt;10% (448.65)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Qtr FY15</td>
<td>520.4</td>
<td></td>
</tr>
<tr>
<td>2nd Qtr FY15</td>
<td>646</td>
<td></td>
</tr>
<tr>
<td>3rd Qtr FY15</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4th Qtr FY15</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
GOAL #1 – Continuously Improve Maintenance and Operations

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

ACTION PLAN

• Actions Completed
  – BES Lead Technicians identified (11/2014)
  – Determined Zone and Shift assignments for all technicians and informed all BES Technicians of new assignments (12/2014)
  – Conducted (OS1) volunteer meeting and Pilot Building walk-through (11/2014)
  – Conducted interviews for Recycling Coordinator position (1/2015)

• Actions Planned
  – Develop new task cards for all BES Zones (3/1/15)
  – Conduct (OS1) Boot Camp and begin (OS1) Pilot in Friday building (end of FY14-FY15)
  – Continue Re-engineering implementation planning meetings thru (3/1/15)
  – Review and continue quarterly self audits (3/1/15)
Facilities Management Strategic Planning Session – Second Quarter FY 2015

GOAL #1 – Continuously Improve Maintenance and Operations of the Campus

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

Lead: Building Environmental Services
Balanced Scorecard Category: Customer Perspective

APPALevels.png

Percentage = 82%
(OS1) Baseline Audit Scores - Organization Comparison

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

Percentage

UNC Chapel Hill: 13
U Mich: 8
WFU: 12
MSU: 12
MT SAC: 11
Provo School District: 6
UNC Charlotte: 8
Standard: 80
Facilities Management Strategic Planning Session – Second Quarter FY 2015

GOAL #1 – Continuously Improve Operation of Campus Facilities
Objective: 1.5: Improve Facility Systems Reliability
Tactic: 1.5.1: Improve Completion of Preventative Maintenance Work Requests to 90%
Tactic: 1.5.2: Decrease number of Unscheduled Equipment Replacement Projects to less than 2 incidents per quarter
Tactic: 1.5.3: Fewer than 5 unscheduled outages per quarter
Tactic: 1.5.4: Improve Ratio of Preventive/Predictive work requests to reactive request to 50%

ACTION PLAN

Actions Planned

1 – Complete conversion from old PM Module to new PM Module. (Goal for completion August 2015) UPA and Managers to monitor status.
3 – Continue expansion of PM Program and predictive maintenance program. Work with key customers.
4 – Identify and prioritize equipment conditions and needs for replacement.
5 – Review system projects identified on the R&R list and prioritize. Indicate urgency and recommend future funding dates.
6 – Re-emphasize the Customer Handbook, get out and see the customer; swiftly and accurately report outages.
7 – Reorganize PM Program; PM Supervisor report to Area Manager.
GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.5: Improve Facility Systems Reliability
Tactic: 1.5.1: Improve Completion of Preventative Maintenance Work Requests to 90%
Measure: Percentage of Preventive Maintenance Work Requests Completed

Lead: Facilities Operations
Balance Scorecard Category: Internal Business Process

Improve Completion of PM Work Orders
GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.5: Improve Facility Systems Reliability

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

Measure: Number of Unscheduled Equipment Replacement Projects

Lead: Facilities Operations

Balance Scorecard Category: Internal Business Process

Unscheduled Equipment Replacement Projects

Goal= Less than 2 incidents per quarter
Facilities Management Strategic Planning Session – Second Quarter FY 2015

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

Lead: Facilities Operations
Balance Scorecard Category: Customer Perspective

Unscheduled Outages

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Outages</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Qtr FY15</td>
<td>0</td>
</tr>
<tr>
<td>2nd Qtr FY15</td>
<td>4</td>
</tr>
<tr>
<td>3rd Qtr FY15</td>
<td>0</td>
</tr>
<tr>
<td>4th Qtr FY15</td>
<td>0</td>
</tr>
</tbody>
</table>

Goal: Less than 5 incidents per quarter
GOAL #1 – Continuously Improve Operations of Campus Facilities
Objective: 1.5: Improve Facility Systems Reliability
Tactic: 1.5.4: Improve Ratio of Preventive/Predictive work requests to reactive request to 50%
Measure: Percentage (Number of completed reactive work requests divided by total number of completed work requests including PM and Predictive work requests) (APPA Benchmark)

Lead: Facilities Operations
Balance Scorecard Category: Customer Perspective
GOAL #2

Create a Reliable and Sustainable Physical Infrastructure

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

-- Earl Nightingale, Motivational Speaker
FM Prioritized Projects – FY15

1. Campus Map – Roll over from FY14; Estimated Completion Jun 2015
2. Access and Key Management – Roll over from FY14; Estimated Completion Feb 2014
4. BES ReOrg – Completion March 2015
5. ARCHIBUS 21.3 Upgrade – Estimated Completion Jan 2015
6. Capital Projects Requests and BANNER Integration - Estimated Completion Apr 2014
7. CRDM Parent Child – Estimated Completion Jun 2015
8. BAS Niagara 3.8 Upgrade – Estimated Completion Jun 2015
9. ImageNOW (Archive drawings) – Roll over from FY14; Estimated Completion Feb 2015
10. FO Craftsperson Timesheet/Whiteboard/Split Fund PM – Estimated Completion Jan 2015
12. Design Services Phase 2 Requests – Estimated Completion Date Jun 2015
13. BES EDA Asset Mgmt - Roll over from FY14; Estimated Completion Dec 2014
14. WO Hot /Utility Form – Roll over from FY14; Estimated Completion Dec 2014
15. ARCHIBUS Mobile Proof of Concept – Estimated Completion Feb 2015
17. Mobile Space Inventory - Estimated Completion Apr 2015
18. Mobile Map Utilities Field Units - Estimated Completion Jun 2015
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective: 2.1 Maximize Facilities Management Effectiveness and Efficiency through Information Technology
Tactic: 2.1.1 Complete 40% of the Facilities Management Five-Year Technology Plan

**ACTION PLAN**

**Actions Planned:**

3. Complete/Finalize Campus Map review changes and officially “Go Live” by March 2015.
7. Complete BES Manager/Supervisor Training by March 2015.
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:

2. Completed development of New FO Utility Form for FO.
3. Finalized testing and went live with Beginner Work Request Customer role online training module.
6. Completed 1st phase and testing for FM Print Server Transition project.
Facilities Management Strategic Planning Session – Second Quarter FY 2015

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

Balanced Scorecard Category: Internal Business Processes

FIS Project Task Cumulative Completion Avg.

Qtrly Metric Goal: Cumulative Avg.

2nd QTR GOAL

2nd Qtr. Average

Qtr 1 FY15
Qtr 2 FY15
Qtr 3 FY15
Qtr 4 FY15
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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

**Measure:** Percent Completion of Five-Year Technology Projects

**Balanced Scorecard Category:** Internal Business Processes

**Lead FIS**
Facilities Management Strategic Planning Session – Second Quarter FY 2015

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective: 2.2: Improve Informal Project Design and Construction Process

Lead: Design Services

Balanced Scorecard Category: Internal Business Process

<table>
<thead>
<tr>
<th>Tactic 2.2.1:</th>
<th>95% of All Construction Projects Meet Scheduled Beneficial Occupancy Date (BOD)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Measure:</td>
<td>Percentage (Number of Construction Projects completed on or before delivery date divided by total number of project completed.)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Tactic 2.2.2:</th>
<th>Review Project Capacity - Goal 250 projects per year.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Measure:</td>
<td>Number of Projects Completed (Annual Goal)</td>
</tr>
</tbody>
</table>

**ACTION PLANS FOR IMPROVEMENT**

**NEW IMPROVEMENTS**

Reduce and Eliminate Paper Processes – Requires interface assistance with FIS:
- Convert Scope & Budget to format in Archibus similar to Estimating Workbook.
  - Timeline: FY15 QTR 3 - FY15 QTR 4

- Convert Excel Purchase Requisition to Archibus Purchase Requisition.
  - Timeline: FY15 QTR 3 - FY15 QTR 4

- Update Estimating Workbook to improve Contingency and Fee calculations.
  - Timeline: FY15 QTR 3 - FY15 QTR 4

Customer Orientation for Design Services Processes and Archibus Design Services Project Management:
- Customer meetings to help our Customers understand our processes – Project entry, approvals, timelines, SCO, etc.
  - Timeline: FY15 QTR 3 - FY15 QTR 4

**ongoing improvements**

- Continue ongoing efforts on Classroom Capacity and ADA egress information per building.
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GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective: 2.2: Improve Informal Project Design and Construction Process

Lead: Design Services
Balanced Scorecard Category: Internal Business Process

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

<table>
<thead>
<tr>
<th>QUARTERLY REVIEW</th>
<th>No. Of Projects</th>
<th>Projects Occupied by scheduled date</th>
<th>Projects not Occupied by scheduled date</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY '09</td>
<td>115</td>
<td>100</td>
<td>15</td>
<td>87.0%</td>
</tr>
<tr>
<td>FY '10</td>
<td>182</td>
<td>168</td>
<td>14</td>
<td>92.3%</td>
</tr>
<tr>
<td>FY '11</td>
<td>224</td>
<td>200</td>
<td>24</td>
<td>89.3%</td>
</tr>
<tr>
<td>FY '12</td>
<td>240</td>
<td>231</td>
<td>9</td>
<td>96.3%</td>
</tr>
<tr>
<td>FY '13</td>
<td>139</td>
<td>134</td>
<td>5</td>
<td>96.4%</td>
</tr>
<tr>
<td>FY '14</td>
<td>221</td>
<td>211</td>
<td>10</td>
<td>95.5%</td>
</tr>
<tr>
<td>QTR 1</td>
<td>18</td>
<td>17</td>
<td>1</td>
<td>94.4%</td>
</tr>
<tr>
<td>QTR 2</td>
<td>28</td>
<td>27</td>
<td>1</td>
<td>96.4%</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 '15 STATUS</td>
<td>46</td>
<td>44</td>
<td>2</td>
<td>95.7%</td>
</tr>
</tbody>
</table>
Facilities Management Strategic Planning Session – Second Quarter FY 2015

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% - Recommendation NLT July 2015

Lead: Facilities Planning
Balanced Scorecard Category: Internal Business Process

ACTION PLAN

• Actions Planned:
  o Determine O/A FCI of buildings (Live data available with FCAP updates ongoing) by end of January 2015
  o Re-start CRDM process by launching map and Master List – obtain feedback
  o Conduct campus customer meetings in January 2015
  o Conduct Committee review meetings in January & May 2015
  o Recommend a plan/ prioritize projects to improve FCI by 5% by July 2015.
Facilities Management Strategic Planning Session – Second Quarter FY 2015

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% - Recommendation NLT July 2015.

Measure: Average Building FCI for campus

Lead: Facilities Planning

Balanced Scorecard Category: Internal Business Process
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 July 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 Compose comparative analysis of actual spaces vs UNC Charlotte Approved Standard by March 2015, working with AA
  o Complete space allocations/inventory by room category in Archibus (Ongoing)
  o Compare inventory to standard and report % difference by March 2015
  o Work with FIS to generate report by room use (NLT February, 2015)
  o Recommend a plan/prioritize projects to improve allocations to within 5% of the standard by end of July 2015.
Facilities Management Strategic Planning Session – Second Quarter FY 2015

GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure

Objective 2.4: Improve Campus Space Planning and Utilization

Tactic 2.4.1: 90% of Departments/Colleges within +/- 5% of System-wide space standards NLT end of July 15.

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

Lead: Facilities Planning

Balanced Scorecard Category: Internal Business Process
Facilities Management Strategic Planning Session – Second Quarter FY 2015

GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure

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

Lead: Facilities Planning
Balanced Scorecard Category: Internal Business Process

ACTION PLAN

Actions Planned:
- Sustain current process of completing Operating Budget sheets for new projects (Ongoing)
- Support Capital, when required, with further study related to funding (e.g. HRL, Cone, RDH, Health and Wellness Center, etc. work) (Ongoing)
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>
<tr>
<td></td>
<td>2.5.3</td>
<td>90% of Designs complete by the scheduled completion date</td>
</tr>
<tr>
<td></td>
<td>2.5.4</td>
<td>90% of designs complete within design budgeted fee</td>
</tr>
</tbody>
</table>

**ACTION PLAN**

**Actions Completed**

- CID 2—Elevator Upgrades
- CID 2—Outdoor Events Shelter
- CID 2—SAC Chiller

**Actions Planned**

- PMs, prior to executing the design agreement, arrange a meeting between capital projects, design team, and user group to plan / agree on a design production schedule to be reflected in the designer’s agreement.
- Baseline (BL) schedules – accurate, used weekly by PMs & CMs
- PMs print project budget / financial sheets. Have them on hand for all design meetings. PMs must know their project authorization, current source of funding, available balances.
- Develop a standardized design meeting agenda and make budget, contingency, scope creep, and design production schedule required topics for updating the project team.
- Report monthly to AVC FM status of changes relating to designer fees, scope creep, schedule misses, etc.
- Protect contingency limit uses for unforeseen conditions, inflation
Facilities Management Strategic Planning Session – Second Quarter FY 2015

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

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

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

**Balanced Scorecard Category:** Internal Business Process

<table>
<thead>
<tr>
<th>STRATEGIC REVIEW by Fiscal Year (July-June)</th>
<th>No. of projects authorized in Capstat</th>
<th>Designer under contract w/in 120 days</th>
<th>Designer not under contract w/in 120 days</th>
<th>% Designers under contract w/in</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>Summary FY-14</td>
<td>7</td>
<td>4</td>
<td>1</td>
<td>80%</td>
</tr>
<tr>
<td>Summary FY-15</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>50%</td>
</tr>
<tr>
<td>1st Qtr. FY-15</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>50%</td>
</tr>
<tr>
<td>2nd Qtr. FY-15</td>
<td>4</td>
<td>3</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>3rd Qtr. FY-15</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>n/a</td>
</tr>
<tr>
<td>4th Qtr. FY-15</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>n/a</td>
</tr>
</tbody>
</table>

Tactic Measurement for 2nd Quarter is 100%  
Year to Date is 75%
Facilities Management Strategic Planning Session – Second Quarter FY 2015

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

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

Balanced Scorecard Category: Internal Business Process

<table>
<thead>
<tr>
<th>STRATEGIC REVIEW by Fiscal Year (July-June)</th>
<th>No. of projects completed by scheduled</th>
<th>#not completed by scheduled time</th>
<th>% Designs complete by completion time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summary FY-13</td>
<td>3</td>
<td>1</td>
<td>75%</td>
</tr>
<tr>
<td>Summary FY-14</td>
<td>8</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>Summary FY-15</td>
<td>1</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>1st Qtr. FY-15</td>
<td>1</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>2nd Qtr. FY-15</td>
<td>1</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>3rd Qtr. FY-15</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>4th Qtr. FY-15</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
</tbody>
</table>

Tactic Measurement for 2nd Quarter is 100%
Facilities Management Strategic Planning Session – Second Quarter FY 2015

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

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

Balanced Scorecard Category: Internal Processes

<table>
<thead>
<tr>
<th>STRATEGIC REVIEW by Fiscal Year (July-June)</th>
<th># of designs with original budgeted fee</th>
<th># designs complete not within budget</th>
<th>% Designs not complete w/in</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summary FY-13</td>
<td>3</td>
<td>1</td>
<td>75%</td>
</tr>
<tr>
<td>Summary FY-14</td>
<td>6</td>
<td>1</td>
<td>85%</td>
</tr>
<tr>
<td>Summary FY-15</td>
<td>1</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>1st Qtr. FY-15</td>
<td>1</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>2nd Qtr. FY-15</td>
<td>0</td>
<td>1</td>
<td>100%</td>
</tr>
<tr>
<td>3rd Qtr. FY-15</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>4th Qtr. FY-15</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
</tbody>
</table>

Tactic Measurement for 2\textsuperscript{nd} Quarter is 100%
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

ACTION PLAN

Actions Complete
• Campus Roof Replacements (King, Fretwell, Counseling Center, Barnard, Garinger)(+44 days)
• Cone Plaza (+290 Days)

Actions Planned
• CMs keep baseline schedules current & refer to them regularly, focus on design and construction end dates.
• PMs & CMs discuss schedule (baseline & current) with end users, designers & contractors
• Inform designers and contractors of each other’s contractual schedule dates
• PMs & CMs maintain & print project budgets & account reports monthly (have at all project meetings)
• PMs share budgets with AVC and end users.
• Hold contingency for unforeseen conditions, project requirements, inflation, etc.
• Manage construction scope creep
Facilities Management Strategic Planning Session – Second Quarter FY 2015

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>Summary FY-14</td>
<td>6</td>
<td>3</td>
<td>67%</td>
</tr>
<tr>
<td>Summary FY-15</td>
<td>2</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>1st Qtr. FY-15</td>
<td>2</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>2nd Qtr. FY-15</td>
<td>0</td>
<td>2</td>
<td>0%</td>
</tr>
<tr>
<td>3rd Qtr. FY-15</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>4th Qtr. FY-15</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
</tbody>
</table>

Tactic Measurement for 2nd Quarter is 0%
Facilities Management Strategic Planning Session – Second Quarter FY 2015

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective 2.6 Improve the Capital Construction Process

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

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

Balanced Scorecard Category: Internal Business Process

<table>
<thead>
<tr>
<th>STRATEGIC REVIEW by Fiscal Year (July-June)</th>
<th># completed on schedule</th>
<th>not completed on schedule</th>
<th>% completed on time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summary FY-13</td>
<td>1</td>
<td>2</td>
<td>33%</td>
</tr>
<tr>
<td>Summary FY-14</td>
<td>6</td>
<td>3</td>
<td>67%</td>
</tr>
<tr>
<td>Summary FY-15</td>
<td>2</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>1st Qtr. FY-15</td>
<td>2</td>
<td>2</td>
<td>100%</td>
</tr>
<tr>
<td>2nd Qtr. FY-15</td>
<td>1</td>
<td>1</td>
<td>50%</td>
</tr>
<tr>
<td>3rd Qtr. FY-15</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>4th Qtr. FY-15</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
</tbody>
</table>

Tactic Measurement for 2nd Quarter is 50%
GOAL #3

Foster a Customer Focused Organization

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

- Theo Michelson, State Farm Insurance
Facilities Management Strategic Planning Session – Second Quarter FY 2015

GOAL #3  Foster a Customer Focused Organization

Objective 3.1:  Continuously improve customer service/satisfaction
Tactic 3.1.1:  Achieve overall customer satisfaction of 93% (proposed) for FM services.
Measure:  Annual Customer Survey results: Percentage of customers selecting “fair, good or very good” with the statement: “Overall I am satisfied with <the service> I received from Facilities Management”

Lead: Facilities Management Wide
Balanced Scorecard Category: Customer Perspective

ACTION PLAN

Customer Survey

• Customer interview feedback to be shared with Directors  Spring 2015
  ➢ Questions will relate to how FM can help customers get their work done better and/or faster
  ➢ Ask feedback for following scenario: a customer service center entering and managing work requests

• Action plans, based on interviews and 2014 Customer Survey to be developed by Directors.  Tent. date July 1 or as directed by AVC

• Next Urban Institute survey projected: FY 2016
Facilities Management Strategic Planning Session – Second Quarter FY 2015

GOAL #3  Foster a Customer Focused Organization

**Objective 3.1:** Continuously improve customer service/satisfaction

**Tactic 3.1.1:** Achieve overall customer satisfaction of 93% (proposed) for FM services.

**Measure:** Annual Customer Survey results: Percentage of customers selecting “fair, good or very good” with the statement: “Overall I am satisfied with <the service> I received from Facilities Management”

**Lead:** Facilities Management Wide

**Balanced Scorecard Category:** Customer Perspective

---

**2014 Survey Overall Satisfaction: 93%**
Facilities Management Strategic Planning Session – Second Quarter FY 2015

GOAL #3 – Foster a Customer Focused Organization

Objective: 3.1: Continuously improve customer service/satisfaction

Lead: Design Services
Balanced Scorecard Category: Customer Perspective

<table>
<thead>
<tr>
<th>Tactic 3.1.3:</th>
<th>90% of Informal Project Customers are satisfied or very satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Measure:</td>
<td>Results from Project Customer Questionnaire</td>
</tr>
</tbody>
</table>

ACTION AND PLANS FOR IMPROVEMENT

Archibus - Design Services Customer Survey:
- Over the first two quarters of survey results all have been more than satisfied:
  We received 9 surveys out of 45 issued – 20% Return.
  We need more returns of issued surveys.
- Work with Customers to request responses:
  Customer may not want to have their name tied to a negative survey.
  One on one meetings or phone conversations with high use Customers
  without Project Coordinator may generate more responses.

IMPLEMENTED ACTIONS AND PLANS

Archibus - Design Services Customer Survey:
- Customer responses via Lime-Survey – Success to date.
- Project Priority List includes new column designating “true” Project Customer:
  Allows Survey to be sent to correct Customer.
Facilities Management Strategic Planning Session – Second Quarter FY 2015

GOAL #3 – Foster a Customer Focused Organization

Objective: 3.1: Continuously Improve Customer Service and Satisfaction
Tactic 3.1.3: 90% of Informal Project Customers are more than satisfied or satisfied
Measure: Results from Project Related Customer Surveys

Lead: Design Services
Balanced Scorecard Category: Customer Perspective

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

<table>
<thead>
<tr>
<th>Survey Totals by Fiscal Year</th>
<th>Number of Surveys Issued</th>
<th>Number of Survey Responses</th>
<th>More than Satisfied</th>
<th>Satisfied</th>
<th>Less than Satisfied</th>
<th>Percent Satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY '09</td>
<td>22</td>
<td>18</td>
<td>3</td>
<td>0</td>
<td>95.5%</td>
<td></td>
</tr>
<tr>
<td>FY '10</td>
<td>30</td>
<td>17</td>
<td>5</td>
<td>0</td>
<td>73.3%</td>
<td></td>
</tr>
<tr>
<td>FY '11</td>
<td>33</td>
<td>24</td>
<td>6</td>
<td>2</td>
<td>90.9%</td>
<td></td>
</tr>
<tr>
<td>FY '12</td>
<td>31</td>
<td>27</td>
<td>2</td>
<td>0</td>
<td>92.5%</td>
<td></td>
</tr>
<tr>
<td>FY '13</td>
<td>22</td>
<td>18</td>
<td>3</td>
<td>0</td>
<td>95.5%</td>
<td></td>
</tr>
<tr>
<td>FY '14</td>
<td>24</td>
<td>19</td>
<td>2</td>
<td>0</td>
<td>87.5%</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>FY '15</th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Quarter</td>
<td>27</td>
<td>5</td>
<td>5</td>
<td>0</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>2nd Quarter</td>
<td>18</td>
<td>4</td>
<td>4</td>
<td>0</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>3rd Quarter</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4th Quarter</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

FY '15
- 1st Quarter: 27 surveys, 5 more than satisfied, 5 satisfied, 0 less than satisfied, 0% alert.
- 2nd Quarter: 18 surveys, 4 more than satisfied, 4 satisfied, 0 less than satisfied, 0% alert.

### Survey Totals by Fiscal Year

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Surveys Issued</th>
<th>Responses</th>
<th>More than Satisfied</th>
<th>Satisfied</th>
<th>Less than Satisfied</th>
<th>Percent Satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY '09</td>
<td>22</td>
<td>18</td>
<td>3</td>
<td>0</td>
<td>95.5%</td>
<td></td>
</tr>
<tr>
<td>FY '10</td>
<td>30</td>
<td>17</td>
<td>5</td>
<td>0</td>
<td>73.3%</td>
<td></td>
</tr>
<tr>
<td>FY '11</td>
<td>33</td>
<td>24</td>
<td>6</td>
<td>2</td>
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<td></td>
</tr>
<tr>
<td>FY '12</td>
<td>31</td>
<td>27</td>
<td>2</td>
<td>0</td>
<td>92.5%</td>
<td></td>
</tr>
<tr>
<td>FY '13</td>
<td>22</td>
<td>18</td>
<td>3</td>
<td>0</td>
<td>95.5%</td>
<td></td>
</tr>
<tr>
<td>FY '14</td>
<td>24</td>
<td>19</td>
<td>2</td>
<td>0</td>
<td>87.5%</td>
<td></td>
</tr>
</tbody>
</table>
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 engaged with performance of ESCO contract; keep customers informed; walk the buildings and work with the Energy Manager to keep customers informed; communicate daily.

2 – Support Capital to get buildings commissioned and retro commissioned.

3 – Work with customers; educate them on the UNCC Temperature Control Policy and monitor requests for accuracy.

**Actions Completed**

1 - Implemented daily monitoring of temperatures using BAS and field verification. Continue to develop controls section and cross train with Zones.

2 - Work with other FM team members to establish a communication plan for temperature related building issues; communicate this plan no later than 1 August 2014 and update as needed.

3 - Include Energy Manager in Bi-Weekly Operations’ meetings.

4 - Implemented Customer Satisfaction Survey.
GOAL #3 – Foster a Customer Focused Organization

Objective: 3.1: Continuously improve customer service/satisfaction

Tactic: 3.1.2: Decrease the Number of Hot/Cold Calls by 20%
Measure: Number of Hot/Cold Calls submitted on work requests

Lead: Facilities Operations
Balance Scorecard Category: Customer Perspective

Decrease the Number of Hot/Cold Calls

Goal=Decrease Number by 20%

1st Qtr FY15
2nd Qtr FY15
3rd Qtr FY15
4th Qtr FY15

Too Hot
65
81
65

Too Cold
161
Total
226

138.4
Facilities Management Strategic Planning Session – Second Quarter FY 2015

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 SurveyShare email Survey Results

Lead: Facilities Operations
Balance Scorecard Category: Customer Perspective

Improve Customer Service Satisfaction

<table>
<thead>
<tr>
<th>Question</th>
<th>Very Satisfied</th>
<th>Satisfied</th>
<th>Dissatisfied</th>
<th>Very Dissatisfied</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>How satisfied were you with the time it takes for Fac Ops staff to respond to your issue?</td>
<td>63.16%</td>
<td>28.95%</td>
<td>7.89%</td>
<td>0.00%</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>How satisfied were you with the resolution of your issue or concern?</td>
<td>47.37%</td>
<td>50.00%</td>
<td>2.63%</td>
<td>0.00%</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Was there follow-up? Yes/No</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>60.53%</td>
<td>39.47%</td>
</tr>
<tr>
<td>How satisfied were you with our staff's courteousness and professionalism?</td>
<td>68.42%</td>
<td>31.58%</td>
<td>0.00%</td>
<td>0.00%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>How satisfied were you with your overall experience?</td>
<td>57.89%</td>
<td>36.84%</td>
<td>2.63%</td>
<td>2.63%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Facilities Management Strategic Planning Session – Second Quarter FY 2015

GOAL #3  Foster a Customer Focused Organization

Objective 3.1: Continuously improve customer service/satisfaction
Tactic 3.1.5: Build Brand Awareness
Measure: Action Plan Only

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

ACTION PLAN

Publicity/Public Relations:

• Campus Construction Reports*: Goal to prepare and distribute approx. every six weeks. Feb. 16 week

• Press Releases: Write and distribute through several media channels. Continual through June 30, 2015
  ➢ Clean fuel grants, energy savings, Aperture sculpture, etc.

• Publicity documentation and analytics*: Will report annually. Next is summer, 2015

Internal Communications:

• Intranet  Begin content review and user feedback. (note: level 0 security information) Spring 2015

• Regularly scheduled communications meetings with BES and Operations
  ➢ Bimonthly meetings for both

• Focus group meeting facilitator for employee communications survey review. Group participants being identified.
  ➢ Meeting: March, 2015; Completion and results: April, 2015

• Workshops*: Expand FM audience and subject materials Through June 30, 2015
Facilities Management Strategic Planning Session – Second Quarter FY 2015

GOAL #3  Foster a Customer Focused Organization

Objective 3.1:  Continuously improve customer service/satisfaction
Tactic 3.1.5:  Build brand awareness
Measure:  Action Plan Only

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

ACTION PLAN

Customer Communication Initiatives (interrelated):

• Launch 2nd customer feedback interviews  Winter 2015
  ➢ Share results with Directors  Spring 2015
  ➢ Results will assist with customer survey action plans to be developed by Directors  Tent. date July 1 or as directed by AVC

• External Marketing Campaign*: "Creating A Campus of Distinction"
  ➢ Signage launch  Winter 2015
  ➢ Solicit feedback/input from Directors  Spring 2015
  ➢ Execute campaign tactics (testimonials, LCD signage, website, etc.)  Spring/Summer 2015

• SOP review, development  Winter/Spring 2015

• Customer Handbook* update, launch and remarket; digital and print  Spring 2015

• Website and QA*  Spring/Summer 2015
  ➢ Review web comm. key QA issues/reminders
  ➢ Review requested pages from different units for content/QA
  ➢ User testing

• Customer Facing technology  Spring 2015
  ➢ Communication plans and user testing assistance with Campus Map and CRDM report
Facilities Management Strategic Planning Session – Second Quarter FY 2015

GOAL #3  Foster a Customer Focused Organization

Objective 3.1: Continue to improve customer service/satisfaction

Tactic 3.1.5: Build Brand Awareness

Measure: Action Plan Only

Lead: Facilities Business Office - Communications

Balanced Scorecard Category: Customer Perspective

ACTION PLAN

Special Projects:

- **Sustainability Magazine Launch** w/o Feb 2
  - Final editing & proof completed; reviewed by Jones, Dubois and Hardin
  - Limited print to occur in Feb/Mar.

- **Traffic communications committee (joint partnership with U. Communications):** Research, write and provide upcoming and current campus and perimeter traffic/transportation-related projects to campus stakeholders.
  - Quarterly e-newsletter, articles, announcements, etc. *Varying dates through June 30.*

- **Editing/writing award submissions.** As requested
  - Campus Tree USA Designation/Award: Submitted Dec. 2014; anticipated response March 2015. Communication plan will be developed and launched inline with Arbor Day if award won. *April 2015.*

- **Presentation assistance** as requested

- **Communication Plans:** BES and Operations key announcements, FIS new campus map, CRDM program, customer handbook *Spring and Summer, 2015, depending on assignment*

- **Personnel:** Temporary position request submitted through FY 15 budget process *Spring 2015*
  - **= Areas where position would assist to help meet timeframes and deliverables.*
GOAL #4

Recruit, Develop, and Retain Quality Employees

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

-- Calvin Coolidge, 30th U.S. president
Facilities Management Strategic Planning Session – Second Quarter FY 2015

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:** Innovation & Learning

**ACTION PLAN**

1. Increase the pool of qualified applicants.  As appropriate through June 30, 2015
2. Ensure a qualified diverse applicant pool.  As appropriate through June 30, 2015
3. Ensure efficiency in processing position vacancies and position management activities.  As appropriate through June 30, 2015
4. Ensure FM maintains current on budgeted positions.  As appropriate through June 30, 2015
6. Increase/improve efficiency with Main HR in processing HRMS actions.  As appropriate through June 30, 2015
7. Provide additional HR-related support and assistance to FM units.  January, 2016.
Facilities Management Strategic Planning Session – Second Quarter FY 2015

GOAL #4  Recruit, Develop and Retain Quality Employees

Objective 4.1:  Recruit a Qualified Workforce in a Timely Fashion
Tactic 4.1.1:  Vacancy time of no longer than 80 calendar days – Nonexempt
Vacancy time of no longer than 120 calendar days - Exempt

Measure:  Days needed to fill vacant positions

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

Average Number of Days to Fill Non-Exempt Vacancies FY 2015

Target: 80 days or less
Actual:

# of Non-Exempt Hires
Average Number of Days

STATUS
Facilities Management Strategic Planning Session – Second Quarter FY 2015

GOAL #4 Recruit, Develop and Retain Quality Employees

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

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

Average Number of Days to Fill Exempt (Salaried) Positions 1st Quarter FY 2015

Target = 120 Days
Exempt Hires = 0

# of Exempt Hires
Average Number of Days

STATUS
Facilities Management Strategic Planning Session – Second Quarter FY 2015

GOAL #4  Recruit, Develop and Retain Quality Employees

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

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

ACTION PLAN

Recruitment / Retention thru 06/30/15

- Ensure all new hiring supervisors attend “targeted selection” training. There are many steps in recruitment. Interviewing and reference verifications are essential practices that help eliminate problem performers from being hired.

Culture of engagement

- Increase employee awareness regarding (their) access to HRMS. Started July, 2014 and ongoing (Position Description - Work Plan - Performance Evaluation)

Professional Development

- Learning & Development Coordinator meeting with Units on training. Supervisor’s responsibility to provide training and development opportunities for employees.

Position description

- Ensure position descriptions and competencies up to date. Accurate position description, classification and salary are crucial to effective management. All new hires, transferred employees, promotions receive an updated position description.

Mentioning

- Good relations with employees prevent many disciplinary situations from beginning or worsening.

Employee Relations thru 06/30/15

Discipline

- Closely tied to performance management process.
- Not an independent event - part of a larger process.
- Difficult to argue that an employee should be dismissed for performance when he/she has three years of “outstanding performance management ratings on file"

Documentation

- Roadmap that shows how we got to a certain stage in the discipline process.
- Why document...
- Selective and unreliable memory
- Grievance or lawsuit

If you didn’t document it, then it didn’t happen!

Supervisors Need to Know

- SPA Employee Grievance Policy - effective 5/1/2014
- The 3 causes for disciplinary action
- Unsatisfactory job performance
- Unacceptable personal conduct
- Grossly inefficient performance
- Steps in the progressive discipline process
GOAL #4  Recruit, Develop and Retain Quality Employees

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

Measure: Percent Employees Terminated before end of probationary period

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

Employee’s Separated During 1st Quarter FY 2015

Total Separations 1st Qtr = 13
Employees Separated During Probationary Period 1st Qtr = 5

Target = <5%
Actual = 1.3% Employees Separated during Probationary Period
Facilities Management Strategic Planning Session – Second Quarter FY 2015

GOAL #4 Recruit, Develop and Retain Quality Employees

**Objective 4.2:** Improve Workforce Development

**Tactic 4.2.1:** Increase Supervisor/Manager Training to 40 hours/year

**Tactic 4.2.2:** Increase Employee Training to 20 hours/year

**Lead:** Facilities Business Office

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

---

**FM ACADEMY**

**ACTION PLAN**

<table>
<thead>
<tr>
<th>Action Item</th>
<th>Planned/Completed</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Technical</strong></td>
<td></td>
</tr>
<tr>
<td>– EPA 608 Refrigerant Certifications (F/O)</td>
<td>Complete</td>
</tr>
<tr>
<td>– HVAC Matrix Development</td>
<td>Complete</td>
</tr>
<tr>
<td>– Computer Training for Recycling <em>(ITS Partnership)</em></td>
<td>Complete</td>
</tr>
<tr>
<td>– Computer Training for BES <em>(ITS Partnership)</em></td>
<td>Feb 2015</td>
</tr>
<tr>
<td>– Boiler Operation, Maintenance &amp; Safety (F/O - onsite)</td>
<td>Jan 2015</td>
</tr>
<tr>
<td>– Hands On Electrical Troubleshooting (F/O - onsite)</td>
<td>Feb 2015</td>
</tr>
<tr>
<td>– Trouble Shooting Mechanical Drives Systems &amp; Rotating Equipment</td>
<td>Mar 2015</td>
</tr>
<tr>
<td><strong>Safety Awareness</strong></td>
<td></td>
</tr>
<tr>
<td>– Supervisor Safety Talks</td>
<td>Monthly</td>
</tr>
<tr>
<td>– CPR/1&lt;sup&gt;st&lt;/sup&gt; Aid Training <em>(Innovative Solutions)</em></td>
<td>Jan 2015</td>
</tr>
<tr>
<td><strong>Leadership</strong></td>
<td></td>
</tr>
<tr>
<td>– Documentation &amp; Disciplinary Process</td>
<td>Spring 2015</td>
</tr>
<tr>
<td>– Leadership Communication Workshop</td>
<td>Completed</td>
</tr>
<tr>
<td>– Targeted Selection Training <em>(External consultant)</em></td>
<td>Completed</td>
</tr>
<tr>
<td>– Cultural IQ Training Course</td>
<td>TBD</td>
</tr>
<tr>
<td>– NEO redesign</td>
<td>June 2015</td>
</tr>
<tr>
<td><strong>Externally Driven Initiatives</strong></td>
<td></td>
</tr>
<tr>
<td>– Kronos implementation/training <em>(Financial services)</em></td>
<td>Jan 2015</td>
</tr>
<tr>
<td>– Niner Talent (formerly People Admin) version 7.35 upgrade/training <em>(Campus HR)</em></td>
<td>July 2015</td>
</tr>
</tbody>
</table>
Facilities Management Strategic Planning Session – Second Quarter FY 2015

GOAL #4 Recruit, Develop and Retain Quality Employees

**Objective 4.2:** Improve Workforce Development

**Tactic 4.2.1:** Increase Supervisor/Manager Training to 40 hours/year

**Tactic 4.2.2:** Increase Employee Training to 20 hours/year

**Lead:** Facilities Business Office

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

ACTION PLAN

- Met with each director to discuss staff learning & development needs for FY 15.
- Biweekly attendance at F/O staff meetings for timely information exchange on training, licensure, etc.
- Monthly meetings with BES/R Education Coordinator to discuss upcoming plans, new strategies, etc.
- Developing relationship with consultant Joanna Roop on future training opportunities.
  - Reviewed DDI courses and requested list of potential deliverables. - Fall 2014
  - Schedule meeting with consultant to discuss course details – January 2015
  - Developing new Cultural IQ course; Details to be presented to AVC - January 2015
- FM-HR continuing to develop FM Academy “**Lending Library**” to provide learning resources for FM employees.
  - Developing check-out procedures – February 2015
  - Determine best feasible location to house materials – March 2015
Facilities Management Strategic Planning Session – Second Quarter FY 2015

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 15

Training Hours for Supervisors & Managers by Quarter

Training Hours by QTR
YTD Training Hours

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

FY 2015 Results:
Target - 1,960 hrs
2nd Qtr. Target – 490 hrs

Actual YTD 466.75hrs (24%)
Actual 2nd Qtr. 273.5 hrs (56 %)

ANNUAL
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

Fiscal 2015 Results:
- Annual Target - 7,760 hrs
- 2nd Qtr. Target – 1,940 hrs
- Actual YTD 1,263 hrs (16.3 %)
- Actual 2nd Qtr. 784.5 hrs (40.4 %)
Facilities Management Strategic Planning Session – Second Quarter FY 2015

GOAL #4  Recruit, Develop and Retain Quality Employees

Objective 4.3:  Create and Maintain a Quality Work Environment
Tactic 4.3.1:  90% of Employees satisfied or very satisfied working in FM
Tactic 4.3.2:  87% of Employees satisfied or very satisfied in each unit of FM

Lead:  Facilities Business Office
Balanced Scorecard Category:  Customer Perspective

ACTION PLAN

Survey Results and Data Review:
•  Directors developing actionable items based on survey feedback for report out - Fall 2014;
•  Demographic data provided by HR – every two weeks; Frequencies and crosstabulations of the data have been performed and shared with AVC-FM; will be shared with leadership- Winter 2015

Survey Logistics:
•  Update survey instrument based on feedback from employees (add progress bar, investigate adding a comment box after each section or field for employees to provide feedback, etc.) – Summer 2015
  –  Creation of a survey focus group consisting of non-supervisory employees from each of the major depts. to provide feedback on the questions as currently presented – i.e., are the questions clearly phrased for understanding, are we asking the right questions, etc. approved by AVC-FM 01/20/15
  –  Focus group members to be notified in February 2015; Work/meetings anticipated to begin in March 2015 with a proposed 3 week maximum time commitment by members;
•  Next survey to be administered in October/November 2015.
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

FY 2014 Annual Satisfaction: 89%

Overall how satisfied are you working in the
Facilities Management Department? (2013)

Overall how satisfied are you working in the
Facilities Management Department? (2011)
Facilities Management Strategic Planning Session – Second Quarter FY 2015

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

Unit Customer Satisfaction Survey FY Rating Comparison (%)

<table>
<thead>
<tr>
<th>Unit</th>
<th>2014 Rating</th>
<th>Extremely Satisfied</th>
<th>Very Satisfied</th>
<th>Satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Design Services</td>
<td>88</td>
<td>0</td>
<td>44</td>
<td>44</td>
</tr>
<tr>
<td>Other</td>
<td>87</td>
<td>0</td>
<td>56</td>
<td>31</td>
</tr>
<tr>
<td>Facilities Ops</td>
<td>90</td>
<td>16</td>
<td>35</td>
<td>39</td>
</tr>
<tr>
<td>BES</td>
<td>86</td>
<td>16</td>
<td>33</td>
<td>40</td>
</tr>
<tr>
<td>Recycling</td>
<td>67</td>
<td>17</td>
<td>25</td>
<td>25</td>
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<tr>
<td>Capital</td>
<td>100</td>
<td>25</td>
<td>63</td>
<td>12</td>
</tr>
</tbody>
</table>

All units are not at 87% satisfied
Facilities Management Strategic Planning Session – Second Quarter FY 2015

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

FMAcademy ACTION PLAN

<table>
<thead>
<tr>
<th>Action Item</th>
<th>Target Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Safety related activities</td>
<td></td>
</tr>
<tr>
<td>• Supervisor Safety Talks</td>
<td>Monthly</td>
</tr>
<tr>
<td>• FM Safety Fair</td>
<td>May 2015</td>
</tr>
<tr>
<td>• CPR/1st Aid training</td>
<td>Jan 2015</td>
</tr>
<tr>
<td>Accident/Incident totals YTD (calendar year)</td>
<td></td>
</tr>
<tr>
<td>• Accidents - 12</td>
<td>2014 year end</td>
</tr>
<tr>
<td>• Minor incidents - 2</td>
<td>2014 year end</td>
</tr>
<tr>
<td>Compliance training (OSHA)</td>
<td></td>
</tr>
<tr>
<td>• Confined Space training</td>
<td>Dec 2014</td>
</tr>
<tr>
<td>• Electrical Safety training</td>
<td>Jan 2015</td>
</tr>
<tr>
<td>• FM-HR, Risk Mgmt. and EHS to meet to discuss requirements</td>
<td>Oct 2015</td>
</tr>
<tr>
<td>• Process Review Project</td>
<td>Ongoing</td>
</tr>
<tr>
<td>1. Working with FO Leadership to determine OSHA compliance training needs, current status of employee training, etc.</td>
<td></td>
</tr>
<tr>
<td>2. Identified need to perform process mapping on current state of OSHA training with FO leaders; Date to begin current state mapping TBD</td>
<td></td>
</tr>
<tr>
<td>• All training records sent to FM-HR Staff Dev. Specialist</td>
<td>Continuous</td>
</tr>
</tbody>
</table>
Facilities Management Strategic Planning Session – Second Quarter FY 2015

GOAL #4  Recruit, Develop and Retain Quality Employees

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

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

FM Accident Trends

2013 = 11 accidents
Target 20% Reduction = 9
2014 = 12 accidents

2014 Target ≤ 9
Facilities Management Strategic Planning Session – Second Quarter FY 2015

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

**ACTION PLAN**

Reduce the number of reportable accidents by 20% - Improve Safety Awareness

- Supervisor Safety Talks (SST) - monthly

Compliance Training

- Periodic meetings with EH&S to review needs, processes, etc. – next meeting scheduled Oct. 22, 2014;
- Identified need to perform process mapping on current OSHA training with FO Leaders; Tentatively planned for Winter 2014
- Research training providers/vendors to help fill training gaps, as needed
Facilities Management Strategic Planning Session – Second Quarter FY 2015

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**

<table>
<thead>
<tr>
<th>Action Item</th>
<th>Target Date</th>
</tr>
</thead>
</table>
| Continued development of FM Academy  
  – Marketing Strategy & Website Development | Jan 2015 |
|  – Content Development | Jan 2015 |
|  – Vendor Selection and Delivery | As Needed/As Funded |
| HVAC Developmental Matrix completed | Dec 2014 |
| Targeted Selection Training | Dec 2014 |
| Boiler Operation, Maintenance & Safety | Jan 2015 |
| Computer Training for BES | Feb 2015 |
| “First Time Manager/Supervisor” Training | Feb 2015 |
| Hosting APPA Leadership Academy (Level one) | Apr/May 2015 |
GOAL #5

Promote Good Stewardship

"The more positive you are when you think and work toward your goals, the faster you achieve them."

-- Brian Tracy, Speaker, Author, Consultant
Facilities Management Strategic Planning Session – Second Quarter FY 2015

GOAL #5  Promote Good Stewardship

Objective 5.1: Promote Fiscal Responsibility
Tactic 5.1.1: 100% of financial accounts within budget
Tactic 5.1.2: Increase Supplemental Funding to the Department by 10% annually
Tactic 5.1.3: Achieve Administrative cost/GSF ± 5% of APPA Average for Peer Institutions

Lead: Facilities Business Office
Balanced Scorecard Category: Financial Perspective

ACTION PLAN

Finance/Budget:
- Continue periodic review of Labor Services;
- Develop Budget Memo and Instructions for FY 15-16; Obtain approval from AVC-FM – 1/14/15; Distribute packages to Directors NLT 01/20/15; Add new concept of two-year budget request cycle (Personnel only) this FY;
- Conduct mid-year budget review with BES Director (1/21/15) and FO Leadership (1/22/15); Implement monthly budget review with BES beginning February 2015 through June 2015; Continue current monthly meetings with FO Director through June 2015;

Supplemental Grant/Award Funding:
- NC State Energy Office Grant for Electric Stations; $13K in matching funds set aside for grant; Awaiting final expenditure plan details to determine if set aside can be reallocated; February 2015?
- Campus Tree USA Designation/Award Submittal; Submitted Dec. 31, 2014 (on-time) – Anticipated notification March 2015;
- Developed award submittal for innovative/effective practices: Submitted on-time (11/30/14; Anticipated notification March 2015;
- Search for grant and award possibilities for Facilities Management organizations. For those grants requiring “matching funds”, ensure buy-in from AVC prior to submitting proposals – thru June 2015;
Facilities Management Strategic Planning Session – Second Quarter FY 2015

GOAL #5 Promote Good Stewardship

Objective 5.1: Promote Fiscal Responsibility
Tactic 5.1.1: 100% of financial accounts within budget
Tactic 5.1.2: Increase Supplemental Funding to the Department by 10% annually
Tactic 5.1.3: Achieve Administrative cost/GSF ± 5% of APPA Average for Peer Institutions

Lead: Facilities Business Office
Balanced Scorecard Category: Financial Perspective

ACTION PLAN

Cost Accounting:
• Devise strategy to improve cost accounting measures within all areas of Facilities Management – FY 2015
  – Improve org code usage – July 2014 and July 2015, on-going when possible; Three part org code concerns being addressed to include home org, timesheet org and pay/funding org; Home Org completed for KRONOS pilot; other areas to be addressed; Pay/Funding org actions currently in PeopleAdmin to be processed;
  – Understanding the impact of personnel decisions on budget – on-going through-out FY.
  – Implement budget revision process through June 30, 2015.
• Review monthly position control reports to ensure that positions/budgets are appropriately aligned. - 1st of each month;
• Requested an entry-level accountant position for FY 15 to assist in this area – July 2014;
• Improve use of account codes across FM; Currently addressing on the front end with 49er Mart, but other issues are occurring where there is no upfront oversight by FBO (i.e., ARCHIBUS NR work orders); increase monitoring efforts July 1, 2014 thru June 30, 2015 close out.
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

ACTION PLAN

FY 14 APPA Survey:

- APPA Survey submitted on-time (12/14);
- New NACUBO survey added—responses submitted on-time (12/14);
- Survey results anticipated March 2015;
- Preparations for data gathering process to begin Summer 2015.
GOAL #5 – Promote Good Stewardship

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

ACTION PLAN

- Actions Completed
  - Installation of new Von Drehle paper towel dispensers in Administrative and Academic buildings
  - Submitted square footage cleaned by BES to FBO for inclusion in the annual APPA survey

- Actions Planned
  - Complete supply chain management project in McEniry (one-time funds)
  - Make recommendation to continue or stop hand dryer installations
  - Develop a BES strategic dashboard that tracks cost, quality, and process data points over time
  - Monitor and report custodial cost/student FTE on an annual basis using data from APPA survey
Facilities Management Strategic Planning Session – Second Quarter FY 2014

GOAL #5 – Promote Good Stewardship

Objective: 5.1: Promote Fiscal Responsibility

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

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

Balanced Scorecard Category: Financial Perspective

![Custodial-Total Cost/Student FTE Graph]

- East Carolina University: $204.43
- Portland State University: $204.42
- University of New Mexico: $227.53
- University of North Carolina at Charlotte: $231.30
- University of Texas San Antonio: $222.31
- SRAPPA Region: $349.23

Avg. cost/student = $217.99

UNCC = 6.105% above average

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. Establish guidelines for qualifying reimbursable vs non-reimbursable work requests (To Charge or Not To Charge) by 28 November 2014.

2. Weekly review of Facilities Operations Labor pool before going outside for additional staff support.


**Actions Completed**

1. Identify opportunities to expand reimbursable work in an effort to support labor services funds Nov2014

2. Realign the labor services positions to ensure maximum utilization of resources by Jan 2015

Facilities Management Strategic Planning Session – Second Quarter FY 2015

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 – Second Quarter FY 2015

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

Grounds - Total Cost per Acre

Average Cost = $4.00
Goal = $3.80
UNC Charlotte = 17.5% below average
Facilities Management Strategic Planning Session – Second Quarter FY 2015

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

Lead: Facilities Operations
Balance Scorecard: Financial Perspective

Dollars in Account at End of Fiscal Year

<table>
<thead>
<tr>
<th>1st Qtr FY15</th>
<th>2nd Qtr FY15</th>
<th>Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>$2.4M (100%)</td>
<td>$1.2M (50%)</td>
<td>$1,523,377 (Balance to meet Goal)</td>
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</table>

<table>
<thead>
<tr>
<th>Status</th>
<th>$30,000</th>
<th>$330,000</th>
<th>$630,000</th>
<th>$930,000</th>
<th>$1,230,000</th>
<th>$1,530,000</th>
<th>$1,830,000</th>
<th>$2,130,000</th>
<th>$2,430,000</th>
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</thead>
<tbody>
<tr>
<td>1st Qtr FY15</td>
<td>$494,748 (21.3% Goal Met)</td>
<td>$300,582 (13% Goal Met)</td>
<td>$1,523,377 (Balance to meet Goal)</td>
<td>$30,000</td>
<td>$330,000</td>
<td>$630,000</td>
<td>$930,000</td>
<td>$1,230,000</td>
<td>$1,530,000</td>
</tr>
<tr>
<td>2nd Qtr FY15</td>
<td>$494,748 (21.3% Goal Met)</td>
<td>$300,582 (13% Goal Met)</td>
<td>$1,523,377 (Balance to meet Goal)</td>
<td>$30,000</td>
<td>$330,000</td>
<td>$630,000</td>
<td>$930,000</td>
<td>$1,230,000</td>
<td>$1,530,000</td>
</tr>
</tbody>
</table>
GOAL #5 – Promote Good Stewardship

Objective 5.2 Develop a Sustainable Campus

Objective 5.2.2 Increase Percent of Solid Waste diversion on Campus to 45% by 2018

ACTION PLAN

• Waste Reduction and Recycling

  Actions Complete

  TOTAL recycling for quarter 39% (all totals are not in), 40% for last year
  • Continue to provide timely and efficient collection service of recyclable and reusable items to the entire campus and outreach efforts to University community
  • Second Zero Waste Football season August - November
  • Held Campus Clean UP and Tree Banding – October 22
  • computer training October 8-9 with Jennifer Toth covering Outlook, Microsoft Office, Campus website, etc.
  • Won the Charlotte Chamber Green Works Award for Zero Waste Football
  • Presented on Zero Waste at the SERDEC Summit

  3rd Quarter Actions Planned
  • Replace Recycling Coordinator
  • Start composting program at South Dining
  • Work with H&RL on pairing up all trash cans with recycling cans
  • 2014-2015 waste reduction campaign – exploring greening events and going zero waste at basketball
  • Continue to conduct Waste audits for campus to determine amount of recyclables in waste stream
Facilities Management Strategic Planning Session – Second Quarter FY 2015

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
2nd Quarter FY15

<table>
<thead>
<tr>
<th>Year</th>
<th>Tons Landfilled</th>
<th>Tons Recycled</th>
<th>Diversion Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY 13</td>
<td>604</td>
<td>400</td>
<td>60.4%</td>
</tr>
<tr>
<td>FY 14</td>
<td>604</td>
<td>400</td>
<td>60.4%</td>
</tr>
<tr>
<td>FY 15 (YTD)</td>
<td>544</td>
<td>763</td>
<td>76.3%</td>
</tr>
<tr>
<td>Total Qtr</td>
<td>794</td>
<td>790</td>
<td>79.0%</td>
</tr>
</tbody>
</table>
Facilities Management Strategic Planning Session – Second Quarter FY 2015

Tactic 5.2.2
Increase Percent of Solid Waste Diversion on Campus to 45%
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
Facilities Management Strategic Planning Session – Second Quarter FY 2015

GOAL #5 – Promote Good Stewardship

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

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

ACTION PLAN

• Actions Planned:
  o Assess additional actions list for achieving STARS Silver; by 2/15.
  o Quarterly update of implementation plan for earning further credits based on feasibility: 2/15, 5/15.
  o Achieve silver rating by end of FY 15.
Facilities Management Strategic Planning Session – Second Quarter FY 2015

GOAL #5 – Promote Good Stewardship

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

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

Percentage of Completion

<table>
<thead>
<tr>
<th>Silver Rating</th>
<th>1.10</th>
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<th>.9</th>
<th>.8</th>
<th>.7</th>
<th>.6</th>
<th>.5</th>
<th>.4</th>
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</thead>
<tbody>
<tr>
<td>3rd Qtr F14</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
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</tr>
<tr>
<td>4th Qtr F14</td>
<td>-</td>
<td>-</td>
<td>55%</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>1st Qtr F15</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>68%</td>
<td>-</td>
</tr>
<tr>
<td>2nd Qtr F15</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>72%</td>
</tr>
</tbody>
</table>

STATUS
Facilities Management Strategic Planning Session – Second Quarter FY 2015

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 Develop 7 themes for implementing best practices by May 2015.
    1. Assessment
    2. Faculty Development for Curriculum
    3. Campus as a “Living Laboratory” for Research
    4. Outreach Communications
    5. Design Standards
    6. Standard Operating Procedures
    7. Purchasing Practices
  o Draft annual plan and budget by February 2015 to achieve implementation of 60% of identified best practices.
  o Demonstrate 60% of best practices implemented by October 2015.
Facilities Management Strategic Planning Session – Second Quarter FY 2015

GOAL #5 – Promote Good Stewardship

Objective: 5.2: Develop a Sustainable Campus

Tactic 5.2.4: Implement 60% of the Campus Sustainability Plan best practices NLT end of FY 15.

Measure: Percent of Campus Sustainability Plan best practices implemented

Lead: Facilities Planning

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

**Objective** 5.3  
Conserve Natural Resources

**Tactics** 5.3.1  
Decrease Energy Usage 30% by FY2015

---

#### ACTIONS TO REDUCE CAMPUS ENERGY USAGE

- Performance Contract complete
- System Wide Lighting Performance Contract
- Continue retro-commissioning program
- Exterior Lighting upgrades to LED
  - Street light replacements fixtures have been finalized project to be complete by May.
  - Pedestrian Lights to be replaced as funds become available – start with campus core.
Facilities Management Strategic Planning Session – 2nd QTR FY 2015

GOAL #5 – Promote Good Stewardship

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

Measure: BTUs/GSF/Year consumed on campus

Balanced Scorecard Category: Financial Perspective

CAMPUS ENERGY USAGE
Kbtu/GSF

Base Year FY 2003
Current Reduction 30.2%
Mandated Reduction 30% BY FY 15

Lead Capital

STATUS
GOAL #5 – Promote Good Stewardship

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

Measure: Gallons/GSF/Year consumed on campus

Balanced Scorecard Category: Financial Perspective

Still need to reduce water usage to help preserve valuable resources

Goal 43 Gal/GSF
Actual 21 Gal/GSF
GOAL #5 – Promote Good Stewardship

Objective 5.4: Improve Historically Underutilized Businesses (HUB) Participation

Tactic 5.4.1: 12% HUB participation on 80% of Capital Projects
Tactic 5.4.2: 5% African American Participation on Capital Projects

ACTION PLAN

- Attended NC MWBE Coordinators’ Network Professional Development Conference November 13-14, 2014
- Establish process to ensure compliance with new Prequalification Policy
- Establish/emphasize project specific HUB participation goals for single prime projects
  - CID Roadway Improvements Phase 2 – 15% goal
- Review GFE documentation for compliance before 1st tier subcontracts are awarded
- Work with internal/external groups to identify skilled HUB contractors
Facilities Management Strategic Planning Session – Second Quarter FY2015

GOAL #5 – Promote Good Stewardship

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

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

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

Lead: Capital Projects

Balanced Scorecard Category: Financial Perspective

HUB Participation
Capital Projects > $500,000

Cone Plaza - 26.4% HUB
Campus-wide Roofing Projects - 4% HUB

80% GOAL

Total Projects Completed
Projects with 12% HUB Participation

STATUS
Facilities Management Strategic Planning Session – Second Quarter FY2015

GOAL #5 – Promote Good Stewardship

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

Tactic 5.4.2: 5% African American Participation on Capital Projects

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

Lead: Capital Projects

Balanced Scorecard Category: Financial Perspective

Capital Projects
African American Participation

5% GOAL

<table>
<thead>
<tr>
<th>Year</th>
<th>% Participation</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY2013</td>
<td>6%</td>
</tr>
<tr>
<td>FY2014</td>
<td>4%</td>
</tr>
<tr>
<td>1st Qtr 2015</td>
<td>8%</td>
</tr>
<tr>
<td>2nd Qtr 2015</td>
<td>4%</td>
</tr>
</tbody>
</table>
Facilities Management Strategic Planning Session – Second Quarter FY2015

GOAL #5 – Promote Good Stewardship

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

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

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

Lead: Capital Projects

Balanced Scorecard Category: Financial Perspective

HUB Participation
Informal Projects > $30,000

FY2013: 47%
FY2014: 39%
1st Qtr 2015: 38%
2nd Qtr 2015: 56%

15% GOAL
Facilities Management Strategic Planning Session – Second Quarter FY 2015

GOAL #5 – Promote Good Stewardship

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

Lead: Design Services

Balanced Scorecard Category: Internal Business Process

| Tactic 5.4.4: | 13% overall HUB participation on informal projects below $30,000 including 3% African American |
| Measure:      | Total Percentage of HUB participation on all Informal Projects below $30,000 (Construction only) divided by Total Contracts |
| Tactic 5.4.5: | 3% African American participation on Informal projects below $30,000 |
| Measure:      | Total African American contract dollars (Construction only) divided by Total Contract Dollars |

ACTION PLANS FOR IMPROVEMENT

NEW IMPROVEMENTS

Currently focused on expanding our outreach to new African American contractors & vendors.

Timeline: FY15 QTR 3 - FY15 QTR 4

Design Services and FIS are working to improve HUB reporting via ARCHIBUS Strategic Quarterly Reports.

Timeline: FY15 QTR 3 - FY15 QTR 4

ONGOING IMPROVEMENTS

All Coordinators are encouraged to reach out to new vendors for work on our Under $30K projects - Ongoing.

➤ Continue to review and discuss HUB contractors and vendors at Design Services weekly meetings.
Facilities Management Strategic Planning Session – Second Quarter FY 2015

GOAL #5 – Promote Good Stewardship

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

Lead: Design Services
Balanced Scorecard Category: Internal Business Process

Tactic 5.4.4: 13% overall HUB participation on informal projects below $30,000 including 3% African American
Measure: Total Percentage of HUB participation on all Informal Projects below $30,000 (Construction only) divided by Total Contracts

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>
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</tr>
<tr>
<td>FY '12</td>
<td>$ 2,878,027</td>
<td>$ 891,793</td>
<td>31.0%</td>
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<td>FY '13</td>
<td>$ 2,891,003</td>
<td>$ 902,065</td>
<td>31.2%</td>
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<tr>
<td>FY '14</td>
<td>$ 1,863,533</td>
<td>$ 700,603</td>
<td>37.6%</td>
</tr>
<tr>
<td>QTR 1</td>
<td>$ 495,625</td>
<td>$ 150,457</td>
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</tr>
<tr>
<td>QTR 2</td>
<td>$ 296,965</td>
<td>$ 105,061</td>
<td>35.4%</td>
</tr>
<tr>
<td>QTR 3</td>
<td>$ -</td>
<td>$ -</td>
<td>0.0%</td>
</tr>
<tr>
<td>QTR 4</td>
<td>$ -</td>
<td>$ -</td>
<td>0.0%</td>
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<tr>
<td>FY '15 STATUS</td>
<td>$ 792,590</td>
<td>$ 255,518</td>
<td>32.2%</td>
</tr>
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</table>

FY '09 FY '10 FY '11 FY '12 FY '13 FY '14 QTR 1 QTR 2 QTR 3 QTR 4 FY '15 STATUS

13% Overall HUB Participation – Summary Graph
Facilities Management Strategic Planning Session – Second Quarter FY 2015

GOAL #5 – Promote Good Stewardship

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

Lead: Design Services
Balanced Scorecard Category: Internal Business Process

Tactic 5.4.5: 3% African American participation on Informal projects below $30,000
Measure: Total African American contract dollars divided by Total Contract Dollars

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

<table>
<thead>
<tr>
<th>QUARTERLY REVIEW</th>
<th>Value of Contracts under 30K</th>
<th>African Am. Contribution</th>
<th>African Am. Total</th>
</tr>
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<tbody>
<tr>
<td>FY '09</td>
<td>$996,756</td>
<td>$40,894</td>
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<tr>
<td>FY '10</td>
<td>$1,452,202</td>
<td>$73,987</td>
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<td>FY '11</td>
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<td>FY '14</td>
<td>$1,863,533</td>
<td>$103,513</td>
<td>5.6%</td>
</tr>
</tbody>
</table>

| QTR 1            | $495,625                    | -                        | 0.0%              |
| QTR 2            | $296,965                    | $7,695                   | 2.6%              |
| QTR 3            | $ -                         | $ -                      | -                 |
| QTR 4            | $ -                         | $ -                      | -                 |

FY '15 STATUS     $792,590 $7,695 1.0%

3% African American Participation – Summary Graph