Facilities Management
Quarterly Strategic Planning Session

Second Quarter – Fiscal Year 2016
October – December 2015

AGENDA

Opening – Phil Jones
Brainstorming Session – Phil Jones
Strategic Planning Metrics and Actions Plans
Look Ahead – Phil Jones

…Creating a Campus of Distinction
Strategic Planning Session
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
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. Daily assignment; coordinating and monitoring of work effort.
2. Continue assignment of lead technician in absence of supervisor.
3. Supervisors and Managers weekly assignment; “Manage by Walking around.”
4. Continue to work with Zones and Shops to increase efficiencies.
5. Work with FBO and FIS to finalize RFP “Work Order Process Improvement”
6. PILOT PROGRAM: Checks and balances for all reimbursable work orders using hard copy spreadsheet

Actions Completed

1. Weekly review of work assignment completion.
2. Completed initial training in all Zones “Operating like a business.”
3. Adjusted break schedule to maximize efficiency.
Facilities Management Strategic Planning Session – Second Quarter FY 2016

GOAL #1 – Continuously Improve Operations of Campus Facilities
Objective: 1.1: Improve Labor Availability
Tactic: 1.1.1: Maintain “Wrench” Time at 70%
Measure: Hours (total hours charged to work requests divided by total hours recorded)

Lead: Facilities Operations
Balanced Scorecard Category: Internal Business Process

Wrench Time

<table>
<thead>
<tr>
<th>FY 15 Annual Average</th>
<th>1st Qtr FY16</th>
<th>2nd Qtr FY16</th>
<th>3rd Qtr FY16</th>
<th>4th Qtr FY16</th>
</tr>
</thead>
<tbody>
<tr>
<td>79.2%</td>
<td>60.0%</td>
<td>60.0%</td>
<td>0.0%</td>
<td>0.0%</td>
</tr>
</tbody>
</table>

Goal = Maintain Wrench Time at 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**

**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). Monitor daily tracking of long lead items and spikes in usage (historically the main causes for inability to fill).

2. Continue to send out daily email reminders for approvers (Supervisors, Admins and Managers).

3. Monitor the requisition to PO processing time and discuss weekly.

**Actions Completed**

1. Promoted the continued use of SDI Punch-out.
2. Assigned additional approvers to help expedite the process.
3. Streamlined stock inventory
Facilities Management Strategic Planning Session – Second Quarter FY 2016

GOAL #1 – Continuously Improve Operations of Campus Facilities
Objective: 1.2: Improve Logistics Efficiency
Tactic: 1.2.2: Reduce Average Non-stock Requisition to Receipt Time to 3.5 Days
Measure: Average Days from requisition to receipt (SDI KPI – Non-stock Requisition to Receipt Time)

Lead: Facilities Operations
Balance Scorecard Category: Internal Business Process

Reduce Average Non-stock Requisition to Receipt Time

- FY15 Annual Average: 5.08
- 1st Qtr FY16: 4
- 2nd Qtr FY16: 5.186
- 3rd Qtr FY16: 0
- 4th Qtr FY16: 0

Goal 3.5 Days
GOAL #1 – Continuously Improve Operations of Campus Facilities
Objective: 1.3: Improve Work Request Process
Tactic: 1.3.1: Decrease Number of Work Orders Over 14 Days Old by 15%
Tactic: 1.3.2: Decrease Work Request Cycle Time by 10%
Measure: Hours from Work Request Submitted to Work Complete (APPA Benchmark)

ACTION PLAN

Actions Planned
1. Bi-weekly review of recurring services and scheduled services currently being completed using PM work request.
2. Emphasize Facilities Operations OP-16 Timely and Accurate Handling/Processing of WRs.
3. Weekly meeting with Zone Supervisors to monitor 30 day report.
4. Communicate work order priorities (Quarterly Customer, Building Liaison and specific College Meetings); implemented Sept 2015.
5. Supervisors meeting with technicians on a daily basis.

Actions Completed
1. Communicated work order priorities (Quarterly Customer, Building Liaison and specific College Meetings); implemented July 2014.
2. Reviewed recurring services and scheduled services currently being completed using PM work requests; August 2014.
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GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.3: Improve Work Request Process

Tactic: 1.3.1: Decrease Number of Work Orders Over 14 Days Old by 15%

Measure: Number of open reactive work orders over 14 Days from request (excluding scheduled work orders)

Lead: Facilities Operations

Balance Scorecard Category: Customer Perspective

Number of Work Orders Over 14 Days

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

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

Lead: Facilities Operations
Balance Scorecard Category: Customer Perspective

Decrease Work Request Cycle Time
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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

<table>
<thead>
<tr>
<th>FY15-3rd QTR</th>
<th>FY15-4TH QTR</th>
<th>FY16-1st QTR</th>
<th>FY16-2nd QTR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percentage = 68%</td>
<td></td>
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</tr>
</tbody>
</table>

Lead
BES

STATUS
(OS1) Baseline Audit Scores - Job Category

- Cleaning Wrkr.: 8%
- Training: 8%
- Safety: 9%
- Workloading/Logistics: 6%
- Supervision/Management: 9%
- Benchmarking: 8%

Legend:
- Cleaning Wrkr.
- Training
- Safety
- Workloading/Logistics
- Supervision/Management
- Benchmarking
(OS1) Baseline Audit Scores - Organization Comparison

 UNC Chapel Hill  13
 U Mich  8
 WFU  12
 MSU  12
 MT SAC  11
 Provo School District  6
 UNC Charlotte  8
 STANDARD  80

Percentage

UNC Chapel Hill
U Mich
WFU
MSU
MT SAC
Provo School District
UNC Charlotte
STANDARD
GOAL #1 – Continuously Improve Maintenance and Operations

Objective: 1.4: Improve BES Processes
Tactic 1.4.2: Achieve APPA Level 2 in 98% of Buildings

ACTION PLAN

• Actions Completed
  – Center City Process Checklist (10/2015)
  – (OS1) Boot-camp Part III (12/2015)
  – Attended (OS1) Work loading (12/2015)
  – Successful implementation of weekly 1-on-1 and monthly group meetings between Area Managers and Zone Supervisors (12/2015)
  – Completed floor care training for floor crew (12/2015)

• Actions Planned
  – Full utilization of Daily Logs via Google Forms by Zone Supervisors and Lead Technicians (2/2016)
  – Implement new quarterly self-audit process in Archibus – Monthly inspection of PMs per building (2/2016)
  – Implement In-service training curriculum and matrix (2/2016)
  – Update Hiring Process/Flow Chart (4/2016)
  – Develop BES&R internal web-based portal – working with NiCole Lynch and Frank Stewart (5/2016)
  – Develop Standard Operating Procedures Manual (SOP) for BES&R (ongoing)
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. Reorganize PM Program
2. Complete conversion from old PM Module to new PM Module.
3. Continue expansion of PM Program and predictive maintenance program. Work with key customers.
4. Continue to review CRDM Project List. Identify and prioritize equipment conditions and needs, for replacement. Indicate urgency and recommend future funding dates.
5. Re-emphasize and update the Customer Handbook; get out and see the customer; swiftly and accurately report outages.

Actions Completed
1. Incorporated FCAP inspection process into CRDM and Daily Operations.
2. Hired PM Supervisor.
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GOAL #1 – Continuously Improve Operations of Campus Facilities
Objective: 1.5: Improve Facility Systems Reliability
Tactic: 1.5.1: Improve Completion of Preventative Maintenance Work Requests to 90%
Measure: Percentage of Preventive Maintenance Work Requests Completed

Lead: Facilities Operations
Balance Scorecard Category: Internal Business Process

Improve Completion of PM Work Orders

[Bar chart showing improvement in PM Work Orders completion over quarters]

Goal to 90%
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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]

- Goal = Less than 2 incidents per quarter

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**STATUS**
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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

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

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

Lead: Facilities Operations
Balance Scorecard Category: Customer Perspective

**Improve Ratio of Preventive/Predictive Work Requests**

<table>
<thead>
<tr>
<th>Year</th>
<th>1st Qtr FY16</th>
<th>2nd Qtr FY16</th>
<th>Annual Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY15 Annual Average</td>
<td>50.1%</td>
<td>55.3%</td>
<td>52.2%</td>
</tr>
<tr>
<td>1st Qtr FY16</td>
<td>52.2%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2nd Qtr FY16</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3rd Qtr FY16</td>
<td>0.0%</td>
<td>0.0%</td>
<td></td>
</tr>
<tr>
<td>4th Qtr FY16</td>
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</tr>
</tbody>
</table>

Goal = Improve Ratio to 50%
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 #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:

2. Finalize and Test Real Estate Updates by March 15, 2015.
5. Finalize Real Estate Lease application updates by Feb 28, 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.
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
FM Prioritized Projects – FY16

1. ARCHIBUS Real Estate Leases and Suites – New Estimated Completion Feb 2016
3. FO Refrigeration – Asbestos – Estimated Completion May 2016
4. Motor Fleet Options Updates – Estimated Completion Feb 2015
7. Mobile Recycling – Roll over; New Estimated Completion Feb 2016
8. ARCHIBUS Mobile Proof of Concept – Roll over; Completed Oct 2015
10. Mobile Space Survey – Roll over; Completed Dec 2015
11. Mobile Map Utilities Field Units – Roll Over; Completed Nov 2015
12. Mobile PM & WR for iPad – Estimated Completion May 2016
13. ARCHIBUS Moodle 2 Training – Motor Fleet, Project Customer, Motor Fleet Options and Key Customer
14. GIS Departmental Map Search – Estimated Completion March 2016
15. NVR Upgrade Phase 2 – Estimated Completion Apr 2016
17. GIS Wayfinding Digital Signage System Estimated Completion March 2016
18. FCAP Mobile – Estimated Completion May 2016
22. BIM Belk Gym – Roll over; Completed Dec 2015
23. GIS Space Mgmt. Set Up – Roll Over; Completion Feb 2016
24. SDI Enhancements – Roll Over; New Estimated Completion Nov 2015
26. ARCHIBUS Training Workflow – Estimated Completion May 2016
27. ARCHIBUS Testing Framework – Estimated Completion April 2016
29. Open Options Scripting Updates – New Estimated Completion Mar 2016
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

ACTION PLAN

Actions Completed:

1. Migrated Primavera to State Construction.
2. Completed and Deployed New BAS Upgrade (N4).
5. Completed Proof of Concept Project.
6. Completed BIM data collection process for Belk Gym Project; awaiting final documentation.
7. Completed N4 Server Set up for Building Automations.
Interactive Map Traffic

Peaks at beginning of semesters.

Peak of 1,950 Users per day when students arrived on campus.

Over 16,000 visits in August alone.

August 2015 Traffic
Interactive Map Traffic

Peak of 1,300+ Users per day when students arrived on campus.

Over half of the traffic that comes to facilities.uncc.edu to view maps, visits the Interactive Map.

January 2016 Traffic
Interactive Map Traffic

Total traffic since Interactive Map has gone live: over 55,000 visits.

August 2015 - January 2016 Traffic
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: Convert Scope & Budget to format in Archibus similar to Estimating Workbook.

- Timeline: FY16 QTR 2 – DESIGN SERVICES TESTING PHASE IS NOW ONGOING

Tactic 2.2.2: Review Project Capacity - Goal 250 projects per year.

- Timeline: FY17 QTR 1 – FY17 QTR 4 – Work In Progress

ACTION PLANS FOR IMPROVEMENT

NEW IMPROVEMENTS

Reduce and Eliminate Paper Processes – Requires interface assistance with FIS:

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

Customer Orientation for Design Services Processes and Archibus Design Services Project Management:

- Customer meetings to help our Customers understand our processes – Project entry, approvals, timelines, SCO, etc.
  - Timeline: **FY17 QTR 1 – FY17 QTR 4 – Work In Progress**

ONGOING IMPROVEMENTS

- Continue ongoing efforts to assign Classroom Capacity and provide ADA egress information per building.
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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: Customer

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

95% of All Construction Projects Meet Scheduled Beneficial Occupancy Date (BOD)

<table>
<thead>
<tr>
<th>QUARTERLY REVIEW</th>
<th>No. Of Projects</th>
<th>Projects Occupied by scheduled date</th>
<th>Projects not Occupied by scheduled date</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY11</td>
<td>224</td>
<td>200</td>
<td>24</td>
<td>89.3%</td>
</tr>
<tr>
<td>FY12</td>
<td>240</td>
<td>231</td>
<td>9</td>
<td>96.3%</td>
</tr>
<tr>
<td>FY13</td>
<td>139</td>
<td>134</td>
<td>5</td>
<td>96.4%</td>
</tr>
<tr>
<td>FY14</td>
<td>221</td>
<td>211</td>
<td>10</td>
<td>95.5%</td>
</tr>
<tr>
<td>FY15</td>
<td>216</td>
<td>206</td>
<td>10</td>
<td>95.4%</td>
</tr>
<tr>
<td>FY16</td>
<td>46</td>
<td>45</td>
<td>1</td>
<td>97.8%</td>
</tr>
<tr>
<td>Q 1</td>
<td>19</td>
<td>18</td>
<td>1</td>
<td>94.7%</td>
</tr>
<tr>
<td>Q 2</td>
<td>27</td>
<td>27</td>
<td>0</td>
<td>100.0%</td>
</tr>
<tr>
<td>Q 3</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.0%</td>
</tr>
<tr>
<td>Q 4</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.0%</td>
</tr>
</tbody>
</table>

FY16 STATUS: 46 | 45 | 1 | 97.8%
GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure
Objective 2.3: Develop a Comprehensive Capital Renewal/Deferred Maintenance (CRDM) Program
Tactic 2.3.1: Refine FCI tracking method to illustrate changes over time (by quarter) and use this information as a tool for recommending projects to improve campus FCI by 5% NLT July 2016.

ACTION PLAN

- Continue to update CRDM data (ongoing)
- Integrate feedback from users of map and master list (ongoing)
- Update FCI tracker by building to capture FCAP changes and project completions to calculate movement in FCI (ongoing)
- Provide status and recommendations to attain a 5% improvement (July 2016)
Facilities Management Strategic Planning Session – Second Quarter FY 2016

GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure

Objective 2.3: Develop a Comprehensive Capital Renewal/Deferred Maintenance (CRDM) Program
Tactic 2.3.1: Refine FCI tracking method to illustrate changes over time (by quarter) and use this information as a tool for recommending projects to improve campus FCI by 5% NLT July 2016.

Measure: Average Building FCI for campus

Lead: Facilities Planning
Balanced Scorecard Category: Internal Business Process

Percentage of Completion

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Percentage of Completion</th>
</tr>
</thead>
<tbody>
<tr>
<td>3rd Qtr FY 15</td>
<td>50%</td>
</tr>
<tr>
<td>4th Qtr FY 15</td>
<td>50%</td>
</tr>
<tr>
<td>1st Qtr FY 16</td>
<td>70%</td>
</tr>
<tr>
<td>2nd Qtr FY 16</td>
<td>70%</td>
</tr>
</tbody>
</table>
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)

**ACTION PLAN**

- Sustain current process of completing Operating Budget sheets for new projects
- Complete studies related to future Capital projects, Friday Settlement Issue, Light Rail Circulation Study, and Craver and Mary Alexander Road Intersection Sector Study - future building site cost analysis (proposed Science site)
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective 2.5 Improve the Capital Planning and Design Process
Tactic 2.5.2 90% of designers under contract within 120 days of the Project posting in CAPSTAT
2.5.3 90% of Designs complete by the scheduled completion date
2.5.4 90% of designs complete within design budgeted fee

ACTION PLAN

Actions Completed
• Began advanced planning on Admissions Center, Belk Track Resurfacing, Health & Wellness

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

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**Tactic Measurement for 2nd Quarter is N/A**
Facilities Management Strategic Planning Session – Second Quarter FY 2016

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

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

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

**Balanced Scorecard Category**: Internal Business Process

<table>
<thead>
<tr>
<th>STRATEGIC REVIEW by Fiscal Year (July-June)</th>
<th>No. of projects completed by scheduled</th>
<th>#not completed by scheduled time</th>
<th>% Designs complete by completion time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summary FY-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>3</td>
<td>1</td>
<td>75%</td>
</tr>
<tr>
<td>1st Qtr. FY-16</td>
<td>1</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>2nd Qtr. FY-16</td>
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<tr>
<td>4th Qtr. FY-16</td>
<td>0</td>
<td>0</td>
<td>N/A</td>
</tr>
</tbody>
</table>

Tactic Measurement for 2nd Quarter is N/A
Facilities Management Strategic Planning Session – Second Quarter FY 2016

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

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

Balanced Scorecard Category: Internal Processes

<table>
<thead>
<tr>
<th>STRATEGIC REVIEW by Fiscal Year (July-June)</th>
<th># of designs with original budgeted fee</th>
<th># designs complete not within budget</th>
<th>% Designs not complete w/in budgeted fee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summary FY-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>3</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>1st Qtr. FY-16</td>
<td>1</td>
<td>0</td>
<td>100%</td>
</tr>
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<tr>
<td>4th Qtr. FY-16</td>
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</tbody>
</table>

Tactic Measurement for 2nd Quarter is N/A
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

ACTION PLAN

Actions Complete
• Took occupancy of Belk Gym (minus pool, i.e. late scope addition)

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 2016

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

**Objective** 2.6 Improve the Capital Construction Process

**Tactic** 2.6.1 90% of capital construction Projects completed on time

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

**Balanced Scorecard Category:** Customer Perspective

<table>
<thead>
<tr>
<th>STRATEGIC REVIEW by Fiscal Year (July-June)</th>
<th># completed on schedule</th>
<th>not completed on schedule</th>
<th>% completed on time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summary FY-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>5</td>
<td>3</td>
<td>63%</td>
</tr>
<tr>
<td>1st Qtr. FY-16</td>
<td>1</td>
<td>3</td>
<td>25%</td>
</tr>
<tr>
<td>2nd Qtr. FY-16</td>
<td>0</td>
<td>1</td>
<td>0%</td>
</tr>
<tr>
<td>3rd Qtr. FY-16</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4th Qtr. FY-16</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Tactic Measurement for 2nd Quarter is 0%

[Graph showing percentage of projects completed on schedule by quarter]
Facilities Management Strategic Planning Session – Second Quarter FY 2016

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>
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<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>4</td>
<td>2</td>
<td>67%</td>
</tr>
<tr>
<td>1st Qtr. FY-16</td>
<td>1</td>
<td>3</td>
<td>25%</td>
</tr>
<tr>
<td>2nd Qtr. FY-16</td>
<td>0</td>
<td>1</td>
<td>0%</td>
</tr>
<tr>
<td>3rd Qtr. FY-16</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4th Qtr. FY-16</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Tactic Measurement for 2nd Quarter is 0%
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 #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 FOR IMPROVEMENT

Customer Satisfaction Survey
- Will contact Urban Institute for survey administration calendar; UI will assign team member to administer survey; 5 month timeline required; Projected survey administration in Fall 2016 (FY 17).

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

Internal Communications:
- Intranet and Web Site  Content review and user feedback. (note: level 0 security information) FIS and WAG meetings to be reinstated;
- Regularly scheduled communications meetings with BES and Operations
  - Bimonthly meetings for both with the first scheduled for January 22
GOAL #3 – Foster a Customer Focused Organization
Objective: 3.1: Continuously improve customer service/satisfaction
Tactic: 3.1.2: Decrease the Number of Hot/Cold Calls by 20%
Tactic: 3.1.4: 90% of Reactive Work Request Customers are satisfied or very satisfied

**ACTION PLAN**

**Actions Planned**

1. Continue to work with customers; educate them on the UNCC Temperature Control Policy and monitor requests for accuracy.
2. Continue to develop BAS Controls section and cross-train with Zones.
3. Continue to include Energy Manager in Bi-Weekly Operations’ meetings.
4. Continue daily monitoring of building temperatures within Zones.
5. Develop Utilities Team (focus on BAS Team; retro commissioning and Utility Manager) December 2015
6. Working w Capital; Retro-commissioning 3 buildings (Cameron, McEniry, Smith)
7. Continue to improve condensate return for main Steam Plant
8. Working with Capital; Mechanical Systems Upgrade Project (Kennedy)

**Actions Completed**

1. Implemented daily monitoring of temperature using BAS and field verification. Continue to develop controls section and cross-train with Zones.
3. Updated temperature policy
Facilities Management Strategic Planning Session – Second Quarter FY 2016

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

Lead: Facilities Operations

Decrease the Number of Hot/Cold Calls

Goal = Decrease Number by 20% (145 Total)
GOAL #3 – Foster a Customer Focused Organization

Objective: 3.1: Continuously Improve Customer Service/Satisfaction

Lead: Design Services
Balanced Scorecard Category: Internal Business Process

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

ACTION PLANS FOR IMPROVEMENT

Archibus - Design Services Customer Survey:

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

• After project is complete, stop by and meet with Customer to review how the renovated space is performing.

• Keeping the communication lines open by email, phone and face to face works wonders.

• When possible, hold weekly meetings on job site to discuss progress with Customer.
Facilities Management Strategic Planning Session – Second Quarter FY 2016

GOAL #3 – Foster a Customer Focused Organization

Objective: 3.1: Continuously Improve Customer Service/Satisfaction

Lead: Design Services
Balanced Scorecard Category: Internal Business Process

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

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

<table>
<thead>
<tr>
<th>Survey Totals by Fiscal Year</th>
<th>Number of Surveys issued</th>
<th>Number of Survey Responses</th>
<th>More than Satisfied</th>
<th>Satisfied</th>
<th>Less then Satisfied</th>
<th>Percent Satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY10</td>
<td>30</td>
<td>30</td>
<td>18</td>
<td>5</td>
<td>0</td>
<td>76.7%</td>
</tr>
<tr>
<td>FY11</td>
<td>33</td>
<td>33</td>
<td>24</td>
<td>6</td>
<td>2</td>
<td>90.9%</td>
</tr>
<tr>
<td>FY12</td>
<td>31</td>
<td>31</td>
<td>27</td>
<td>2</td>
<td>0</td>
<td>93.5%</td>
</tr>
<tr>
<td>FY13</td>
<td>22</td>
<td>22</td>
<td>18</td>
<td>3</td>
<td>0</td>
<td>95.5%</td>
</tr>
<tr>
<td>FY14</td>
<td>24</td>
<td>24</td>
<td>18</td>
<td>3</td>
<td>0</td>
<td>87.5%</td>
</tr>
<tr>
<td>FY15</td>
<td>117</td>
<td>41</td>
<td>35</td>
<td>3</td>
<td>0</td>
<td>92.7%</td>
</tr>
<tr>
<td>FY16</td>
<td>29</td>
<td>13</td>
<td>9</td>
<td>4</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>1st Quarter</td>
<td>17</td>
<td>10</td>
<td>7</td>
<td>3</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>2nd</td>
<td>12</td>
<td>3</td>
<td>2</td>
<td>1</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>
<tr>
<td>2nd</td>
<td>12</td>
<td>3</td>
<td></td>
<td></td>
<td></td>
<td>25.0%</td>
</tr>
</tbody>
</table>

Customers Comments:

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

PC is very attentive to detail; PC offers wise professional advice, and is always friendly.
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>Satisfied</th>
<th>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>90.90%</td>
<td>9.10%</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>How satisfied were you with the resolution of your issue or concern?</td>
<td>95.45%</td>
<td>4.55%</td>
<td></td>
<td>0</td>
</tr>
<tr>
<td>Was there follow-up?</td>
<td></td>
<td></td>
<td>63.63%</td>
<td>36.37%</td>
</tr>
<tr>
<td>Yes/No</td>
<td>95.45%</td>
<td>4.55%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>How satisfied were you with our staff's courteousness and professionalism?</td>
<td>90.47%</td>
<td>9.53%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
GOAL #3  Foster a Customer Focused Organization
Objective 3.1:  Continuously improve customer service/satisfaction
Lead: Facilities Business Office - Communications
Balanced Scorecard Category: Customer Perspective

Tactic 3.1.5:
Measure: Build brand awareness
Action Plan Only

ACTION PLAN FOR IMPROVEMENT

Customer Communication Initiatives (interrelated):
• Launch 2nd customer feedback interviews Late Fall 2016, Early Spring 2017
• External Marketing Campaign*: “Creating A Campus of Distinction”
  ➢ Signage  This launched in February, 2015, and meetings with BES and FO to be scheduled.
  ➢ Solicit feedback/input from Directors  Meetings to be scheduled to discuss potential expansion
• Customer Facing technology  Meeting to be held February 9
  ➢ Communication plans and user testing assistance with Campus Map and CRDM Report.

Special Projects:
• Traffic communications committee (joint partnership with U. Communications):
  ➢ Request guidance from AVC
GOAL #4

Recruit, Develop, and Retain Quality Employees

“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 #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%

**Balanced Scorecard Category:** Innovation & Learning

---

**ACTION PLAN FOR IMPROVEMENT**

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

GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

Tactic 4.1.1: Vacancy time of no longer than 80 calendar days – Nonexempt
Vacancy time of no longer than 120 calendar days - Exempt

Measure: Days needed to fill vacant positions

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

FM New Hire/ Promotion 2nd Quarter FY 2016

- New Hires = 9
- Promotions = 4

FM New Hires/ Promotions per Department 2nd Quarter FY 2016

Department-wise breakdown of new hires and promotions for nonexempt and exempt employees.
Facilities Management Strategic Planning Session – Second Quarter 2016

GOAL #4  Recruit, Develop and Retain Quality Employees

Objective 4.1:  Recruit a Qualified Workforce in a Timely Fashion

Tactic 4.1.1:  Vacancy time of no longer than 80 calendar days – Nonexempt
               Vacancy time of no longer than 120 calendar days - Exempt

Measure:  Days needed to fill vacant positions

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

Average Number of Days to Fill Nonexempt Vacancies - FY 2016

Target - 80 Calendar Days  
Missed by – 69 Days
Facilities Management Strategic Planning Session – Second Quarter 2016

GOAL #4  Recruit, Develop and Retain Quality Employees
Objective 4.1:  Recruit a Qualified Workforce in a Timely Fashion

**Tactic 4.1.1:**
Vacancy time of no longer than 80 calendar days – Nonexempt
Vacancy time of no longer than 120 calendar days - Exempt

**Measure:**
Days needed to fill vacant positions

**Balanced Scorecard Category:** Innovation & Learning

### Average Number of Days to Fill Exempt (Salaried) Vacancies - FY 2016

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Average Number of Days</th>
<th># of Exempt Hires/Prom</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q1</td>
<td>161</td>
<td>2</td>
</tr>
<tr>
<td>Q2</td>
<td>187</td>
<td>2</td>
</tr>
<tr>
<td>Q3</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Q4</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

**Target** – 120 Calendar days

**Missed by** – 67 days
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 FOR IMPROVEMENT

ONGOING AND CONTINUOUS – Through June, 2016

1) Maintain updated position descriptions
2) Work Plans
3) Probationary Period
4) Employee Evaluations
5) Employee relations documentation - 3 causes for disciplinary action

   a) Unsatisfactory job performance - problems with quantity/quality of performance; not following procedure; timeliness; accuracy & absenteeism
   b) Unacceptable personal conduct - behavior, attitude (falsifying job application, theft, alcohol, refusing to accept assignment, betraying confidential info)
   c) Grossly inefficient performance - destroying state property, causing harm or loss of life, etc.
Facilities Management Strategic Planning Session - Second Quarter 2016

GOAL #4  Recruit, Develop and Retain Quality Employees

**Objective 4.1:** Recruit a Qualified Workforce in a Timely Fashion

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

**Measure:** Percent Employees Separated before end of probationary period.

**Lead:** Facilities Business Office

**Balanced Scorecard Category:** Innovation & Learning

### Turnover Rate
1st Quarter = .36%
2nd Quarter = .54%

### Separations by Department During Probation

**Nonexempt FY 2016**

- BES: 1
- Grounds: 1
- Recycling: 1
- BES: 1

**Salaried Exempt FY 2016**

- None
- None
- None
- None

**Status**
Facilities Management Strategic Planning Session – Second Quarter 2016

GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

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

Measure: Percent Employees Terminated before end of probationary period

Lead: Facilities Business Office

Balanced Scorecard Category: Innovation & Learning

Separations FY 2016 Nonexempt

Resignations = 2
Retirement = 2
Terminations = 4
Death = 1

<table>
<thead>
<tr>
<th>Qtr 1</th>
<th>Qtr 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>BES</td>
<td>Resignation (4)</td>
</tr>
<tr>
<td>FBO</td>
<td>Retirement (1)</td>
</tr>
<tr>
<td>Grounds</td>
<td>Termination (1)</td>
</tr>
<tr>
<td>High Voltage</td>
<td>Termination (1)</td>
</tr>
<tr>
<td>Lock Shop</td>
<td>Termination (1)</td>
</tr>
<tr>
<td>Recycling</td>
<td>Death (1)</td>
</tr>
<tr>
<td>BES Planning</td>
<td>Termination (2)</td>
</tr>
<tr>
<td>Zone 4</td>
<td>Termination (1)</td>
</tr>
</tbody>
</table>
GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

Tactic 4.1.2: 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

FM Separations FY 2016 Exempt
**GOAL #4  Recruit, Develop and Retain Quality Employees**

**Objective 4.2:** Improve Workforce Development

<table>
<thead>
<tr>
<th>Tactic 4.2.1:</th>
<th>Increase Supervisor/Manager Training to 40 hours/year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tactic 4.2.2:</td>
<td>Increase Employee Training to 20 hours/year</td>
</tr>
</tbody>
</table>

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

**ACTION PLAN FOR IMPROVEMENT**

**FM ACADEMY**

**Action:** Increase training opportunities available to FM Employees  
**Planned/Completed**

**Technical**
- Electrical Trouble Shooting & Preventive Maintenance  
  March 2016
- Pump Repair & Maintenance  
  May 2016

**Safety**
- Supervisor Safety Talks  
  Monthly
- Winter Preparedness Expo (Dec 2015)  
  Completed

**Leadership**
- APPA Leadership Academy – Level II  
  Feb 2016
- APPA Leadership Academy – Level III  
  March 2016
- APPA Supervisor Toolkit  
  June 2016
- NEO redesign  
  June 2016
- Cultural IQ Training  
  TBD

**Externally Driven Initiatives**
- Niner Talent “Workplan” training  
  Jan 2016
- Kronos training  
  As needed
Facilities Management Strategic Planning Session – Second Quarter 2016

GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.2: Improve Workforce Development

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

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

Training Hours by Quarter

Training Hours for Supervisors & Managers by Quarter

FY 2016
Target - 1,960 hrs
2nd Qtr. Target – 490 hrs

Actual YTD
335 hrs (17 %)
Actual 2nd Qtr.
228 hrs (47 %)
Facilities Management Strategic Planning Session – Second Quarter 2016

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**

Lead: Facilities Business Office

Balanced Scorecard Category: Internal Business Process. Learning and Growth

**FY 16**

*Training Hours for front line employees by Quarter*

- **Annual Target**
  - Annual Target - 7,760 hrs
  - 2nd Qtr. Target – 1,940 hrs

- **Actual YTD**
  - 1,223 hrs (16%)

- **Actual 2nd Qtr.**
  - 829 hrs (42%)
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 |

Balanced Scorecard Category: Customer Perspective

ACTION PLAN FOR IMPROVEMENT

Survey Logistics:

- Update survey instrument based on feedback from employees (add progress bar, investigate adding a comment box after each section or field for employees to provide feedback, etc.) – **TBD (based upon UI availability)**
- Discuss survey administration feasibility with Urban Institute and obtain potential scheduling timeframes – January 2016;
- Next survey date TBD.
**GOAL #4  Recruit, Develop and Retain Quality Employees**

**Objective 4.4:**  Improve Employee Safety

<table>
<thead>
<tr>
<th>Tactic 4.4.1:</th>
<th>Reduce the number of reportable accidents by 20%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tactic 4.4.2:</td>
<td>98% of Mandatory Compliance Training completed annually</td>
</tr>
<tr>
<td>Measure:</td>
<td>Percent of employees completing mandatory compliance training</td>
</tr>
</tbody>
</table>

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

### ACTION PLAN

**Activities to Foster “Safety Mindset”**

- Supervisor Safety Talks (SST)  
  - Monthly
- Twelve month SST topics calendar posted for 2016  
  - Annual
- 6th Annual FM Safety Fair  
  - Annual
- 8th Annual FM Safety Slogan Contest  
  - Annual

**Safety Training**

- “Safety Training Needs Assessment” sent to new employees & their supervisor  
  - Ongoing
- “EHS Safety Check List” sent to Directors  
  - Oct 2015
- List Safety training topics/links on FM Learning & Development web page  
  - Oct 2015
- Communicate EH&S training schedule to FM  
  - Ongoing
Facilities Management Strategic Planning Session – Second Quarter 2016

**GOAL #4  Recruit, Develop and Retain Quality Employees**

**Objective 4.4: Improve Employee Safety**

**Tactic 4.4.1:** Reduce the number of reportable accidents by 20%

**Measure:** Number of Reportable Accidents (Measured by Calendar Year)

**Lead:** FM Wide

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

---

**FM Accident Trends**

2016 Continuous Improvement Target ≤ 17
GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.4: Improve Employee Safety

| Balanced Scorecard Category: Innovation and Learning Perspective |

**Action Plan for Improvement**

<table>
<thead>
<tr>
<th>Action Item</th>
<th>Target Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Safety Training FY16 YTD – <strong>881 hours</strong></td>
<td>Ongoing</td>
</tr>
<tr>
<td>• Safety Training Taskforce (Collaborative initiative with EH&amp;S)</td>
<td></td>
</tr>
<tr>
<td>• Winter Preparedness Expo</td>
<td>Dec 2015</td>
</tr>
<tr>
<td>• Safety related activities</td>
<td></td>
</tr>
<tr>
<td>• FM Safety Committee meeting</td>
<td>Bi-monthly</td>
</tr>
<tr>
<td>• Supervisor Safety Talks (<em>12-month calendar posted to website</em>)</td>
<td>Monthly</td>
</tr>
<tr>
<td>• Safety Slogan Contest - “<strong>Safety Pays In Many Ways</strong>”</td>
<td>July 2016</td>
</tr>
<tr>
<td>• Accident/Incident Totals (CY15)</td>
<td>2015 CY</td>
</tr>
<tr>
<td>• Accidents - 21</td>
<td>2015 CY</td>
</tr>
<tr>
<td>• Minor incidents – 6</td>
<td></td>
</tr>
</tbody>
</table>
GOAL #4  Recruit, Develop and Retain Quality Employees

Objective 4.5: Improve Workforce Performance (Action Plan Only)

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

ACTION PLAN FOR IMPROVEMENT

<table>
<thead>
<tr>
<th>Action Item</th>
<th>Target Date</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>FM Academy</strong></td>
<td></td>
</tr>
<tr>
<td>•  Web Content Development, working with NiCole Lynch, FM Communications Officer, for updates on Learning &amp; Development webpage.</td>
<td>Ongoing</td>
</tr>
<tr>
<td>–  Online training evaluation form posted to FM website</td>
<td></td>
</tr>
<tr>
<td>–  Supervisor Safety Talk (SST) topics 2016 calendar published</td>
<td></td>
</tr>
<tr>
<td>–  Commonly used FM Acronyms listing (to be published Feb 2016)</td>
<td></td>
</tr>
<tr>
<td>–  Training vendor sourcing &amp; selection (as needed/as funded)</td>
<td></td>
</tr>
<tr>
<td>–  Updates to website on upcoming L &amp; D events</td>
<td></td>
</tr>
<tr>
<td><strong>Leadership</strong></td>
<td></td>
</tr>
<tr>
<td>•  Hosting APPA leadership workshops onsite. Leadership Academy Level I completed May 2015.</td>
<td></td>
</tr>
<tr>
<td>–  APPA Leadership Academy (Level II)</td>
<td>Feb 2016</td>
</tr>
<tr>
<td>–  APPA Leadership Academy (Level III)</td>
<td>Mar/Apr 2016</td>
</tr>
<tr>
<td>–  APPA Supervisor Toolkit</td>
<td>June 2016</td>
</tr>
<tr>
<td><strong>Technical</strong></td>
<td></td>
</tr>
<tr>
<td>•  Working with Materials Management on RFP process to secure onsite training providers.</td>
<td>Mar 2016</td>
</tr>
<tr>
<td>–  Electrical Troubleshooting &amp; Preventive Maintenance</td>
<td>Apr/May 2016</td>
</tr>
<tr>
<td>–  Pump Repair &amp; Maintenance</td>
<td></td>
</tr>
</tbody>
</table>
GOAL #5

Promote Good Stewardship

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

-- Brian Tracy, Speaker, Author, Consultant
GOAL #5 Promote Good Stewardship

Objective 5.1: Promote Fiscal Responsibility

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

Balanced Scorecard Category: Financial Perspective

**ACTION PLAN FOR IMPROVEMENT**

**Finance/Budget:**
- FY 16 Call for Divisional one-time funding completed on time; Total FM request $2.8M; Received to date = $1M
- Develop allocation method for training budgets;
- Holding Budget Meetings for BES and FO Departments monthly with director and quarterly with respective leadership teams; Mid-year budget reviews with FO and BES leadership teams scheduled for January 2016;
- Reinstitute capital project budget meetings with Capital team; Meetings began October 2015; Next meetings to be scheduled for January 21, 2016;
- INTERSCOPE training and refreshers provided/completed as needed; additional training provided to Materials Management for quarterly HUB report in October – will be repeated in January 2016;
- Budget Memo and Instructions draft prepared for submission to AVC in late January 2016; Package distribution to be completed during week of January 18th; Training course on how to complete the spreadsheet under consideration.
- **NEW:** Management Process for projects managed by FO – Growing area of concern regarding budget management and tracking of expenses for larger dollar (capitalized – over $5K) projects done by FO.

**Supplemental Grant/Award Funding:**
- Search for grant and award possibilities for Facilities Management organizations. For those grants requiring “matching funds”, ensure buy-in from AVC prior to submitting proposals – thru June 2016; Currently on hold due to absence of Grants Management/Procurement specialist until February 2016;
GOAL #5  Promote Good Stewardship

Objective 5.1: Promote Fiscal Responsibility

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

Balanced Scorecard Category: Financial Perspective

ACTION PLAN FOR IMPROVEMENT

Cost Accounting – Ongoing Improvements

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

GOAL #5 Promote Good Stewardship

Objective 5.1: Promote Fiscal Responsibility

Tactic 5.1.2: Increase Supplemental Funding to the Department by 10% annually
Measure: Percent increase in supplemental funding

Lead: Facilities Business Office
Balanced Scorecard Category: Financial Perspective
**GOAL #5  Promote Good Stewardship**

**Objective 5.1:  Promote Fiscal Responsibility**

<table>
<thead>
<tr>
<th>Tactic 5.1.3:</th>
<th>Achieve Administrative cost/GSF ± 5% of APPA Average for Peer Institutions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Measure:</td>
<td>Administrative cost/GSF from annual APPA Facilities Performance Indicators Report (APPA Benchmark)</td>
</tr>
</tbody>
</table>

**Lead: Facilities Business Office**

**Balanced Scorecard Category:** Financial Perspective

### ACTION PLAN FOR IMPROVEMENT

**FY 15 APPA Survey:**

- Cost Data collection for FY 15 survey: *Complete - December 2015*;
- Beta version available: *Tentatively* February 2016;
- Actual results available: *Tentatively* March 2016;
- Presentation of comparative findings for UNC Charlotte Administrative cost/ GSF: *Tentatively* April 2016 SP session.

**FY 15 NACUBO Key Facilities Metrics Survey:**

- Data collection for FY 15 survey completed and submitted on time;
- Actual results available: *Tentatively* March 2016;
- Review of data and next step determination is outstanding; AVC guidance needed.
GOAL #6 – Promote Good Stewardship - Second Quarter FY 2016

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
  – (EDA-EI) Equipment Inventory process implemented throughout entire unit (12/2015)

• Actions Planned
  – Research compostable PPE’s and Trash bags at Center City (2/2016)
  – Complete logistics portion of Supply Chain Management Project in McEniry (4/2016)
  – Complete building needs assessment for floor care equipment (2/2016)
  – Develop a BES strategic dashboard that tracks cost, quality, and process data points over time (ongoing)
  – Submit Second Draft of 5-Year BES&R Plan to Phil Jones (2/2016)
  – Install COED and Kennedy laundry rooms (4/2016)
  – Monitor and report custodial cost/student FTE on an annual basis using data from APPA survey (ongoing)
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 July 2015. Rough draft completed; working with Dr. Jay Raja.
2. Weekly review of Facilities Operations Labor pool before going outside for additional staff support.
3. Tracking Labor Services bi-weekly with separate shop goals.
4. Active participants in upcoming Process for Reengineering Project.

**Actions Completed**

1. Realigned the labor services positions to ensure maximum utilization of resources by Jan 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

Facilities Management Strategic Planning Session – Second Quarter FY 2016

Dollars in Account at End of Fiscal Year

Goal $2.8M

<table>
<thead>
<tr>
<th>1st Qtr FY16</th>
<th>2nd Qtr FY16</th>
<th>3rd Qtr FY16</th>
<th>4th Qtr FY16</th>
</tr>
</thead>
<tbody>
<tr>
<td>$671,684.02</td>
<td>$452,516.53</td>
<td>$1,675,799.45</td>
<td></td>
</tr>
</tbody>
</table>

24% of Annual Goal
16% of Annual Goal
(Balance to meet Goal)

$1,124,200.55
Facilities Management Strategic Planning Session – Second Quarter FY 2016

Objective 5.2: Develop a Sustainable Campus

Tactic 5.2.1
Increase Recycling of Construction and Demolition Materials on Capital Projects to 80% of Total C&D Waste

Measure: Pounds of C & D Waste Recycled divided by Total Pounds of C & D Waste

Balanced Scorecard Category: Innovation and Learning Perspective

Construction & Demolition Debris Diversion
2nd Quarter FY16

STATUS:
2nd Qtr
Facilities Management Strategic Planning Session – Second Quarter FY 2016

**Tactic 5.2.2**
Increase Percent of Solid Waste Diversion on Campus to 45% by 2020
Measure: Pounds of Solid Waste Recycled, composted and reused
Annually divided by Total Solid Waste

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

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**Breakdown of Solid Waste**

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Diverted Waste</th>
<th>MSW Waste</th>
</tr>
</thead>
<tbody>
<tr>
<td>Baseline 4th Qtr FY08</td>
<td>198 tons</td>
<td>695 tons</td>
</tr>
<tr>
<td>3rd Qtr FY15</td>
<td>251 tons</td>
<td>758 tons</td>
</tr>
<tr>
<td>4th Qtr FY15</td>
<td>443 tons</td>
<td>876 tons</td>
</tr>
<tr>
<td>1st Qtr FY16</td>
<td>265 tons</td>
<td>680 tons</td>
</tr>
<tr>
<td>2nd Qtr FY16</td>
<td>298 tons</td>
<td>868 tons</td>
</tr>
</tbody>
</table>

*Notable increase in 4th quarter due to a Grounds project in May that removed tons of dirt from campus.

**Annual Solid Waste Comparison**


Types of waste Diverted, Total Solid Waste
GOAL #5 — Promote Good Stewardship
Objective 5.2 Develop a Sustainable Campus
Objective 5.2.2 Increase Percent of Solid Waste diversion on Campus to 45% by 2018

ACTION PLAN

• Waste Reduction and Recycling

   Actions Complete
   • Continuing work with HRL to increase recycling rates in residence halls.
   • Continuing training new C&D Coordinator.
   • Football season was completed (*average ~76% recycling from stadium*).
   • Trash hauling driver was changed; working on getting him trained and on board.

   3rd Quarter Actions Planned
   • Continue planning building for hazardous/universal waste storage (*with Grounds and Design*).
   • Increase social media presence – Twitter, Facebook, Instagram.
   • Plan for Spring Campus Cleanup, Tree Planting, and Earth Day activities. (*with Grounds and Sustainability*)
   • Continue to conduct Waste audits for campus to determine amount of recyclables in waste stream – ON HOLD (*space constraints and scheduling*)
   • Conduct waste audits in housing quads where there are no recycling bins (continue working with HRL to pair up all trash and recycling bins) – ON HOLD (*space constraints and scheduling*)
   • Departmental training - waste audits on our Recycling roll-offs at ReCommunity (*February 8 and 15*)
   • Increase education component – beginning with Chartwell’s dining halls (*SoVi and Crown Commons*).
GOAL #5 – Promote Good Stewardship
Objective: 5.2: Develop a Sustainable Campus
Tactic 5.2.3: Achieve silver rating on the Sustainability Tracking and Reporting System (STARS) NLT end of FY 16.
Measure: STARS points to achieve silver rating

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

ACTION PLAN

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

GOAL #5 – Promote Good Stewardship

Objective: 5.2: Develop a Sustainable Campus
Tactic 5.2.3: Achieve silver rating on the Sustainability Tracking and Reporting System (STARS) NLT end of FY 16.
Measure: STARS points to achieve silver rating

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

Objective: 5.2: Develop a Sustainable Campus
Tactic 5.2.4: Implement 60% of the Campus Sustainability Plan best practices NLT end of FY 16.
Measure: Percent of Campus Sustainability Plan best practices implemented

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

ACTION PLAN

- Apply 7 themes for implementing best practices:
  1. Assessment (March-April STARS Submission)
  2. Faculty Development for Curriculum (May Workshop for Faculty)
  3. Campus as a Laboratory (CGI: $28k for studies underway, supplies)
  4. Outreach Communications (Website development; CGI: $5k for signs)
  5. Design Standards
     - CGI: biking, water, recycling; completed $72k; $20k underway; $34k new in Dec.
     - CFAT: $64k for car-charging stations
  6. Standard Operating Procedures (CFAT $15k and CGI $15k for EV monitoring)
  7. Purchasing Practices (Need to start new Task Force)

- Estimated 63% of best practices implemented by (>60% in July 2015; COMPLETED):
  o Continue: In-house certifications (e.g. Green Office)
  o Upgraded: Sustainability Website based on 7 Themes
GOAL #5 – Promote Good Stewardship

Objective: 5.2: Develop a Sustainable Campus

Tactic 5.2.4: Implement 60% of the Campus Sustainability Plan best practices NLT end of FY 16.

Measure: Percent of Campus Sustainability Plan best practices implemented

Lead: Facilities Planning

Balanced Scorecard Category: Innovation and Learning Perspective

**Percentage of Completion**

<table>
<thead>
<tr>
<th>Quarter</th>
<th>FY 15</th>
<th>FY 16</th>
</tr>
</thead>
<tbody>
<tr>
<td>3rd Qtr</td>
<td>57%</td>
<td>63%</td>
</tr>
<tr>
<td>4th Qtr</td>
<td>61%</td>
<td>61%</td>
</tr>
<tr>
<td>1st Qtr</td>
<td>61%</td>
<td></td>
</tr>
<tr>
<td>2nd Qtr</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
GOAL #5 – Promote Good Stewardship
Objective 5.3 Conserve Natural Resources
Tactics 5.3.1 Decrease Energy Usage 30% by FY2015

TACTICS 5.3.1 Decrease Energy Usage 30% by FY2015

ACTIONS TO REDUCE CAMPUS ENERGY USAGE

- Continue retro-commissioning program
  - Cameron, McEniry, & Smith started
- Exterior Lighting upgrades to LED
  - Street light replacements - Complete
  - Replacing building mounted HID’s
  - Pedestrian Lights to be replaced as funds become available – start with campus core.
- New Goal of 40% reduction by 2025
GOAL #5 – Promote Good Stewardship

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

Measure: BTUs/GSF/Year consumed on campus

Balanced Scorecard Category: Financial Perspective

CAMPUS ENERGY USAGE
Kbtu/GSF

Base Year FY 2003
Current Reduction 35%
System Goal of 40% by 2025
Facilities Management Strategic Planning Session – Second Quarter FY 2016

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

---

<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</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goal</td>
<td>54</td>
<td>40</td>
<td>36</td>
<td>36</td>
<td>32</td>
<td>34</td>
<td>29</td>
<td>32</td>
<td>34</td>
<td>34</td>
<td>24</td>
<td>19</td>
<td>21</td>
</tr>
<tr>
<td>Actual</td>
<td>43</td>
<td>34</td>
<td>34</td>
<td>24</td>
<td>19</td>
<td>21</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
GOAL #5 – Promote Good Stewardship

Objective 5.4: Improve Historically Underutilized Businesses (HUB) Participation

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

**ACTION PLAN**

- Establish project specific participation goals for single prime projects
  - 20% goal for Elm, Maple, Pine Renovation
- Challenge GCs to obtain 25% or better participation on CMAR projects
- Review *GFE* documentation for compliance before 1st tier subcontracts are awarded on CMAR projects
- Work with internal/external groups to identify skilled HUB contractors
- Work with GA/SCO/DOA to ensure HUB information is accurately reflected in InterscopePlus
- Work with SCO to revise new Prequalification Policy
- Conduct Construction *Meet & Greet* March 10, 2016
Facilities Management Strategic Planning Session – Second Quarter FY2016

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
Facilities Management Strategic Planning Session – Second Quarter FY2016

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

Belk Gymnasium Renovation – 3.6% AA
Facilities Management Strategic Planning Session – Second Quarter FY2016

GOAL #5 – Promote Good Stewardship

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

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

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

Lead: Capital Projects

Balanced Scorecard Category: Financial Perspective

HUB Participation
Informal Projects > $30,000

<table>
<thead>
<tr>
<th>Status</th>
<th>15% GOAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>39%</td>
</tr>
<tr>
<td>2015</td>
<td>100%</td>
</tr>
<tr>
<td>1st Qtr 2016</td>
<td>100%</td>
</tr>
<tr>
<td>2nd Qtr 2016</td>
<td>96%</td>
</tr>
</tbody>
</table>

Total Informal Project Dollars
Informal Project Dollars w/HUB Firms
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**

Design Services’ HUB participation improvement is currently focused on expanding our outreach to new African American contractors & vendors.

Design Services and Facilities Information Systems are working to improve HUB reporting of contractors & vendors via ARCHIBUS Strategic Quarterly Reports.

**ONGOING IMPROVEMENTS**

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

➢ Design Team continue to review and discuss HUB contractors and vendors at our Design Services weekly meetings.
Facilities Management Strategic Planning Session – Second Quarter FY 2016

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

<table>
<thead>
<tr>
<th>QUARTERLY REVIEW</th>
<th>Value of Contracts under 30K</th>
<th>H.U.B. Contribution</th>
<th>HUB Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY09</td>
<td>$ 996,756</td>
<td>$ 89,479</td>
<td>9.0%</td>
</tr>
<tr>
<td>FY10</td>
<td>$ 1,452,202</td>
<td>$ 88,703</td>
<td>6.1%</td>
</tr>
<tr>
<td>FY11</td>
<td>$ 3,924,102</td>
<td>$ 857,125</td>
<td>21.8%</td>
</tr>
<tr>
<td>FY12</td>
<td>$ 2,878,027</td>
<td>$ 891,793</td>
<td>31.0%</td>
</tr>
<tr>
<td>FY13</td>
<td>$ 2,891,003</td>
<td>$ 902,065</td>
<td>31.2%</td>
</tr>
<tr>
<td>FY14</td>
<td>$ 1,863,533</td>
<td>$ 700,603</td>
<td>37.6%</td>
</tr>
<tr>
<td>FY15</td>
<td>$ 2,655,882</td>
<td>$ 1,150,394</td>
<td>43.3%</td>
</tr>
<tr>
<td>Q 1</td>
<td>$ 455,156</td>
<td>$ 166,732</td>
<td>36.6%</td>
</tr>
<tr>
<td>Q 2</td>
<td>$ 472,858</td>
<td>$ 197,068</td>
<td>41.7%</td>
</tr>
<tr>
<td>Q 3</td>
<td>$ -</td>
<td>$ -</td>
<td>0.0%</td>
</tr>
<tr>
<td>Q 4</td>
<td>$ -</td>
<td>$ -</td>
<td>0.0%</td>
</tr>
<tr>
<td>FY ’16 STATUS</td>
<td>$ 928,014</td>
<td>$ 363,800</td>
<td>39.2%</td>
</tr>
</tbody>
</table>

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

13% Overall HUB Participation – Summary Graph

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

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<td>$ 1,150,394</td>
<td>43.3%</td>
</tr>
<tr>
<td>Q 1</td>
<td>$ 455,156</td>
<td>$ 166,732</td>
<td>36.6%</td>
</tr>
<tr>
<td>Q 2</td>
<td>$ 472,858</td>
<td>$ 197,068</td>
<td>41.7%</td>
</tr>
<tr>
<td>Q 3</td>
<td>$ -</td>
<td>$ -</td>
<td>0.0%</td>
</tr>
<tr>
<td>Q 4</td>
<td>$ -</td>
<td>$ -</td>
<td>0.0%</td>
</tr>
<tr>
<td>FY ’16 STATUS</td>
<td>$ 928,014</td>
<td>$ 363,800</td>
<td>39.2%</td>
</tr>
</tbody>
</table>

13% Overall HUB Participation – Summary Graph

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

<table>
<thead>
<tr>
<th>QUARTERLY REVIEW</th>
<th>Value of Contracts under 30K</th>
<th>H.U.B. Contribution</th>
<th>HUB Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY09</td>
<td>$ 996,756</td>
<td>$ 89,479</td>
<td>9.0%</td>
</tr>
<tr>
<td>FY10</td>
<td>$ 1,452,202</td>
<td>$ 88,703</td>
<td>6.1%</td>
</tr>
<tr>
<td>FY11</td>
<td>$ 3,924,102</td>
<td>$ 857,125</td>
<td>21.8%</td>
</tr>
<tr>
<td>FY12</td>
<td>$ 2,878,027</td>
<td>$ 891,793</td>
<td>31.0%</td>
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<tr>
<td>FY13</td>
<td>$ 2,891,003</td>
<td>$ 902,065</td>
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<tr>
<td>FY14</td>
<td>$ 1,863,533</td>
<td>$ 700,603</td>
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<tr>
<td>FY15</td>
<td>$ 2,655,882</td>
<td>$ 1,150,394</td>
<td>43.3%</td>
</tr>
<tr>
<td>Q 1</td>
<td>$ 455,156</td>
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<td>$ 928,014</td>
<td>$ 363,800</td>
<td>39.2%</td>
</tr>
</tbody>
</table>
Facilities Management Strategic Planning Session – Second Quarter FY 2016

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>
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<tr>
<td>FY10</td>
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<tr>
<td>FY12</td>
<td>$2,878,027</td>
<td>$46,475</td>
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</tr>
<tr>
<td>FY13</td>
<td>$2,891,003</td>
<td>$115,219</td>
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<tr>
<td>FY14</td>
<td>$1,863,533</td>
<td>$103,513</td>
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<tr>
<td>FY15</td>
<td>$2,655,882</td>
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<td>1.8%</td>
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<tr>
<td>Q 1</td>
<td>$455,156</td>
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</tr>
<tr>
<td>Q 2</td>
<td>$472,858</td>
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<td>6.3%</td>
</tr>
<tr>
<td>Q 3</td>
<td>$ -</td>
<td>$ -</td>
<td>0.0%</td>
</tr>
<tr>
<td>Q 4</td>
<td>$ -</td>
<td>$ -</td>
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<tr>
<td>FY16 STATUS</td>
<td>$928,014</td>
<td>$31,070</td>
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</table>

3% African American Participation – Summary Graph