Facilities Management
Quarterly Strategic Planning Session

Fourth Quarter – Fiscal Year 2015
April – June 2015

AGENDA

Opening – Phil Jones

Strategic Planning Metrics and Actions Plans

Business Processes Status Report - Directors

FY15 Accomplishments

FY16 Wildly Important Goals

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
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.

Actions Completed

1. Weekly review of work assignment completion.
2. Completed initial training in all Zones “Operating like a business.”
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. 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 use of SDI Punch-out; conducted lunch and learn July 2014.

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

Lead: Facilities Operations
Balance Scorecard Category: Internal Business Process

Reduce Average Non-stock Requisition to Receipt Time

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Average Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Qtr FY15</td>
<td>4.47</td>
</tr>
<tr>
<td>2nd Qtr FY15</td>
<td>5.35</td>
</tr>
<tr>
<td>3rd Qtr FY15</td>
<td>6.18</td>
</tr>
<tr>
<td>4th Qtr FY15</td>
<td>4.3</td>
</tr>
<tr>
<td>Annual Average</td>
<td>5.08</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Value</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>1633</td>
</tr>
<tr>
<td>4th Qtr FY15</td>
<td>745</td>
</tr>
<tr>
<td>Annual Average</td>
<td>1048.25</td>
</tr>
</tbody>
</table>

Goal equals < 15% (1232)
Facilities Management Strategic Planning Session – Fourth 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

- Goal <10%
- 1st Qtr FY15: 520.4
- 2nd Qtr FY15: 573.7
- 3rd Qtr FY15: 642.1
- 4th Qtr FY15: 540.8
- Annual Average: 569.25

Goal: <10%

(448.65)
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
  – Conducted (OS1) pilot building audit (5/2015)
  – Conducted(OS1) Decision-to-Proceed meeting (5/2015)
  – Reviewed and continued quarterly self audits (6/1/15)
  – Began routine process of EDA Inventory Count (6/2015)

• Actions Planned
  – Develop In-service training curriculum and matrix (8/2015)
  – (OS1) Bootcamp Part II (8/2015)
  – Develop 5-Year BES&R Plan (9/1/2015)
  – Update Hiring Process/Flow Chart (10/2015)
  – Implement new Budget process for BES Zone Supervisors (8/2015)
Facilities Management Strategic Planning Session – Fourth 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

Percentage
95% (4th Quarter)
86% (Annual Average)
(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
- U Mich
- WFU
- MSU
- MT SAC
- Provo School District
- UNC Charlotte
- STANDARD

Percentage:
- UNC Chapel Hill: 80%
- U Mich: 8%
- WFU: 12%
- MSU: 12%
- MT SAC: 11%
- Provo School District: 6%
- UNC Charlotte: 8%
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

1. Complete conversion from old PM Module to new PM Module. (Goal for completion August 2015) UPA and Managers to monitor status.

2. Continue expansion of PM Program and predictive maintenance program. Work with key customers.

3. Identify and prioritize equipment conditions and needs for replacement.

4. Review system projects identified on the R&R list and prioritize. Indicate urgency and recommend future funding dates.

5. Re-emphasize the Customer Handbook, get out and see the customer; swiftly and accurately report outages.

6. Reorganize PM Program; PM Supervisor report to Area Manager; August 2016.
Facilities Management Strategic Planning Session – Fourth Quarter FY 2015

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

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**Improve Completion of PM Work Orders**

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Completion Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Qtr FY15</td>
<td>84.0%</td>
</tr>
<tr>
<td>2nd Qtr FY15</td>
<td>87.0%</td>
</tr>
<tr>
<td>3rd Qtr FY15</td>
<td>80.6%</td>
</tr>
<tr>
<td>4th Qtr FY15</td>
<td>81.7%</td>
</tr>
<tr>
<td>Annual Average</td>
<td>83.3%</td>
</tr>
</tbody>
</table>

**Goal to 90%**
Facilities Management Strategic Planning Session – Fourth Quarter FY 2015

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 – Fourth 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></th>
<th>1ST QTR FY15</th>
<th>2ND QTR FY15</th>
<th>3RD QTR FY15</th>
<th>4TH QTR FY15</th>
<th>ANNUAL AVERAGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goal</td>
<td>0.0</td>
<td>4.0</td>
<td>3.0</td>
<td>2.0</td>
<td>2.3</td>
</tr>
</tbody>
</table>

Goal = Less than 5 incidents/Qtr
Facilities Management Strategic Planning Session – Fourth Quarter FY 2015

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

![Graph showing improvement in ratio of preventive/predictive work requests](image)

**Goal = Improve Ratio to 50%**

- 1st Qtr FY15: 51.2%
- 2nd Qtr FY15: 45.0%
- 3rd Qtr FY15: 51.5%
- 4th Qtr FY15: 52.7%
- Annual Average: 50.1%
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; Completed July 15, 2015
2. Access and Key Management – Roll over from FY14; Estimated Completion Feb 2014
4. BES ReOrg – Completed March 2015
5. ARCHIBUS 21.3 Upgrade – Completed Feb 2015
7. CRDM Parent Child – Estimated Completion Jun 2015
8. BAS Niagara 3.8 Upgrade – Completed Jun 2015
9. ImageNOW (Archive drawings) – Roll over from FY14; Completed Jun 2015
10. FO Craftsperson Timesheet/Whiteboard/Split Fund PM – Completed Mar 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; Completed Jan 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

2. Complete Phase 1 of Key Management by Sept 30, 2015.
4. Continuation of user support for FM department’s Google transition through FY16 Qtr 1.
5. Finalize Motor Fleet Customer Moodle2 Training for Aug 1, 2015 Go Live (Currently in Review/Test Phase)
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:

7. Completed invoicing/close out of all FIS FY15 POs on time and on budget by May 2015.
8. Successfully collaborated with FO to resolve SDI/Work Request issues for FY15 close outs deadlines – May/Jun 2015.
Facilities Management Strategic Planning Session – Fourth 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.

FIS’s 4th QTR AVERAGE: 73.61%

4th QTR GOAL: 100.00%

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

STATUS
Facilities Management Strategic Planning Session – Fourth 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
Project Status Completion Percentage

Balanced Scorecard Category: Internal Business Processes
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 - Work In Progress

- Convert Project Timeline to format in Archibus.
  - Timeline: FY15 QTR 3 - FY15 QTR 4 - Work In Progress

Reduce and Eliminate Paper Processes – Completed:

- Convert (old) Purchase Requisition to interactive Purchase Requisitions: (1) Commodities; (2) Services; (3) Change Orders.
  - Timeline: FY15 QTR 3 - FY15 QTR 4 - Success – It works.

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

ONGOING IMPROVEMENTS

- Continue ongoing efforts to assign Classroom Capacity and provide ADA egress information per building.
Facilities Management Strategic Planning Session – Fourth 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

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 projects 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>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>43</td>
<td>41</td>
<td>2</td>
<td>95.3%</td>
</tr>
<tr>
<td><strong>QTR 4</strong></td>
<td><strong>127</strong></td>
<td><strong>121</strong></td>
<td><strong>6</strong></td>
<td><strong>95.3%</strong></td>
</tr>
<tr>
<td><strong>FY '15 STATUS</strong></td>
<td><strong>216</strong></td>
<td><strong>206</strong></td>
<td><strong>10</strong></td>
<td><strong>95.4%</strong></td>
</tr>
</tbody>
</table>

Beneficial Occupancy Summary Graph
Facilities Management Strategic Planning Session – Fourth 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

Tactic 2.2.2: Review Project Capacity - Goal 250 projects per year.
Measure: Number of Projects Completed

Goal 250 Projects Per Year

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>GOAL</th>
<th>Projects Completed</th>
<th>Project Dollars</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY 2003</td>
<td>150</td>
<td>136</td>
<td>$2,060,000</td>
</tr>
<tr>
<td>FY 2004</td>
<td>160</td>
<td>161</td>
<td>$2,609,000</td>
</tr>
<tr>
<td>FY 2005</td>
<td>170</td>
<td>173</td>
<td>$3,450,000</td>
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<tr>
<td>FY 2006</td>
<td>180</td>
<td>194</td>
<td>$8,480,000</td>
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<tr>
<td>FY 2007</td>
<td>190</td>
<td>205</td>
<td>$8,875,000</td>
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<tr>
<td>FY 2008</td>
<td>200</td>
<td>193</td>
<td>$8,200,000</td>
</tr>
<tr>
<td>FY 2009</td>
<td>210</td>
<td>177</td>
<td>$7,745,678</td>
</tr>
<tr>
<td>FY 2010</td>
<td>220</td>
<td>286</td>
<td>$9,935,384</td>
</tr>
<tr>
<td>FY 2011</td>
<td>230</td>
<td>218</td>
<td>$17,944,564</td>
</tr>
<tr>
<td>FY 2012</td>
<td>240</td>
<td>221</td>
<td>$19,393,759</td>
</tr>
<tr>
<td>FY 2013</td>
<td>250</td>
<td>216</td>
<td>$13,589,752</td>
</tr>
<tr>
<td>FY 2014</td>
<td>250</td>
<td></td>
<td>$13,648,336</td>
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<tr>
<td>FY 2015</td>
<td>250</td>
<td></td>
<td>$15,689,835</td>
</tr>
<tr>
<td>FY 2016</td>
<td>250</td>
<td></td>
<td>$3,581,793</td>
</tr>
</tbody>
</table>
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% - Recommend change.

Lead: Facilities Planning
Balanced Scorecard Category: Internal Business Process

ACTION PLAN

- Continue to update CRDM data (ongoing)
- Integrate feedback from users of map and master list (ongoing)
- Create FCI tracker by building which illustrates both FCAP changes and project completions to calculate movement in FCI (complete)
- Amend tactic (pending approval) to:
  - “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 December 2015”
Facilities Management Strategic Planning Session – Fourth 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% - Recommend change.
Measure: Average Building FCI for campus

Lead: Facilities Planning
Balanced Scorecard Category: Internal Business Process

<table>
<thead>
<tr>
<th>Status</th>
<th>Percentage of Completion</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Qtr FY 15</td>
<td>40%</td>
</tr>
<tr>
<td>2nd Qtr FY 15</td>
<td>50%</td>
</tr>
<tr>
<td>3rd Qtr FY 15</td>
<td>80%</td>
</tr>
<tr>
<td>4th Qtr FY 15</td>
<td>58%</td>
</tr>
</tbody>
</table>
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 Recommend change.
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

- Compare sizes of existing spaces to UNC Charlotte approved space standard (In process)
- Complete space inventory by room category in ARCHIBUS (complete)
- Conduct space audit (October 2015)
- Compare inventory to standard and report % difference (April 2016)
- Work with FIS/AA to generate report by room use (NLT October 2015)
- Hand off objective to Director of Space Utilization (August 2015)
- Amend tactic (pending approval) to:
  - Improve utilization of office space in new/renovated projects to within 10% of space guidelines.
Facilities Management Strategic Planning Session –Fourth 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: 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

---

Percentage of Completion

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Qtr FY 15</td>
<td>80%</td>
</tr>
<tr>
<td>2nd Qtr FY 15</td>
<td>85%</td>
</tr>
<tr>
<td>3rd Qtr FY 15</td>
<td>90%</td>
</tr>
<tr>
<td>4th Qtr FY 15</td>
<td>90%</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)

Lead: Facilities Planning
Balanced Scorecard Category: Internal Business Process

ACTION PLAN

- Sustain current process of completing Operating Budget sheets for new projects
- Support Capital, when required, with further study related to funding (e.g. HRL, Cone, RDH, Health and Wellness Center, etc. work)
- Complete for projects to date
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

- 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 two project managers (retirement/loss).

### Actions Planned

- 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 two project managers (retirement/loss).
Facilities Management Strategic Planning Session – Fourth 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 120 days</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>7</td>
<td>5</td>
<td>1</td>
<td>83%</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>1</td>
<td>1</td>
<td>0</td>
<td>100%</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 4th Quarter is N/A
Facilities Management Strategic Planning Session – Fourth 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>3</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>1</td>
<td>0</td>
<td>100%</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 4th Quarter is N/A
Facilities Management Strategic Planning Session – Fourth 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 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-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>1</td>
<td>0</td>
<td>100%</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 4th 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
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
• Colvard North Renovation

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 – Fourth 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>5</td>
<td>3</td>
<td>63%</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>3</td>
<td>0</td>
<td>100%</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 4th Quarter is N/A
Facilities Management Strategic Planning Session – Fourth 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>4</td>
<td>2</td>
<td>67%</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>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>1</td>
<td>1</td>
<td>50%</td>
</tr>
</tbody>
</table>

**Tactic Measurement for 4th 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
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. Support Capital to get buildings commissioned and retro-commissioned (ie, Kennedy Building).
2. Continue to work with customers; educate them on the UNCC Temperature Control Policy and monitor requests for accuracy.
3. Continue to develop controls section and cross-train with Zones; July 2015.
4. Continue daily monitoring of building temperatures within Zones.

Actions Completed
1. Implemented daily monitoring of temperature using BAS and field verification. Continue to develop controls section and cross-train with Zones.
2. Worked with other FM team members to establish a communication plan for temperature related building issues; communicated this plan no later than 1 August 2014 and updated as needed.
3. Continue to include Energy Manager in Bi-Weekly Operations’ meetings.
5. Stayed engaged with performance of ESCO contract; kept customers informed; walked the buildings and worked with the Energy Manager to keep customers informed; daily communication.
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  On Hold for new Communications Officer
  ➢ Questions will relate to how FM can help customers get their work done better and/or faster via website, projects, etc.
  ➢ 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.  On Hold

• Next Urban Institute survey projected: FY 2016
Facilities Management Strategic Planning Session – Fourth 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%
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% (138.4 Total)
Facilities Management Strategic Planning Session – Fourth Quarter FY 2015

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 to be taken by Design Services Team based on Constructive Criticism received in 6 of 41 surveys:**

- Keep Customers informed of any possible schedule changes (6 of 6):
  1. More face to face meetings
  2. Telephone conversations
  3. Document what was said via Email

- Consistent Communication (3 of 6):
  1. Build up Customer relationships
  2. Focus on several short term goals
  3. Maintain and share project notes

**IMPLEMENTED ACTIONS AND PLANS**

- **Project Priority List to include new column designating “true” Project Customer.**
  - **Timeline:** FY15 QTR 1 - FY15 QTR 2 – **Success – It works.**

- **Customer responses via Lime-Survey – Success to date.**
  - **Timeline:** FY15 QTR 1 - FY15 QTR 2 – **Success – It works.**
Facilities Management Strategic Planning Session – Fourth Quarter FY 2015

GOAL #3 – Foster a Customer Focused Organization

**Objective:** 3.1: Continuously Improve Customer Service and 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

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Surveys Issued</th>
<th>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>93.5%</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>

**FY '15 Status:** 117 41 35 4 2 95%

**Comments:**

Constructive Criticism for Fiscal Year 2015 related to 6 Customer Comments:

- Projects did not meet expected scheduled completion date: 6 of 6 Customer Comments
- Less than perfect communication from Project Coordinator: 3 of 6 Customer Comments
Facilities Management Strategic Planning Session – Fourth 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>How satisfied were you with the time it takes for Fac Ops staff to respond to your issue?</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></td>
<td>30.77%</td>
<td>69.23%</td>
<td>0.00%</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>30.77%</td>
<td>69.23%</td>
<td>0.00%</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></td>
<td></td>
</tr>
<tr>
<td>Very satisfied</td>
<td>61.54%</td>
<td>38.46%</td>
<td>0.00%</td>
<td>0.00%</td>
<td>69.23%</td>
<td>30.77%</td>
</tr>
<tr>
<td>How satisfied were you with your overall experience?</td>
<td>30.77%</td>
<td>69.23%</td>
<td>0.00%</td>
<td>0.00%</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>
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 On Hold
  ➢ Share results with Directors On Hold
  ➢ Results will assist with customer survey action plans to be developed by Directors On Hold

• External Marketing Campaign*: “Creating A Campus of Distinction”
  ➢ Project Signage launch This launched in February, 2015, as scheduled.
    ➢ Operations and Design Services have implemented and now manage.
  ➢ Solicit feedback/input from Directors On Hold
  ➢ Execute campaign tactics (testimonials, LCD signage, website, etc.) On Hold

• SOP review, development On Hold

• Customer Handbook* update, launch and remarket; digital and print On Hold

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

• Customer Facing technology Scheduled to launch March, 2015
  ➢ Communication plans and user testing assistance with Campus Map and CRDM report
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

Special Projects:

• **Sustainability Magazine Launch** Launched March 3, 2015
  - Limited print to occur in late Mar./Early April (see Mike Lizotte)

• **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. On Hold

• **Editing/writing award submissions.** As requested On Hold
  - Campus Tree USA Designation/Award: Submitted Dec. 2014; anticipated response March 2015.
    - Notified as award winner in February, 2015. To be announced in sync with Arbor Day and Campus Clean Up.

• **Presentation assistance** as requested

• **Communication Plans:** BES and Operations key announcements, FIS new campus map, CRDM program, customer handbook On Hold

• **Personnel:** Temporary position request submitted and approved through FY 15 budget process On Hold

* = Areas where temp. communication position would assist to help meet timeframes and deliverables.
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. Last one sent March 3, 2015; On Hold

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

• Publicity documentation and analytics*: Will report annually. Next is On Hold

Internal Communications:
• Intranet  Begin content review and user feedback. (note: level 0 security information) On Hold

• Regularly scheduled communications meetings with BES and Operations On Hold
  ➢ Bimonthly meetings for both. Had first meeting with Operations in March, 2015, prior to Shelly’s departure. BES meetings have been held for several months now.

• Focus group meeting facilitator for employee communications survey review. Group participants being identified.
  ➢ Meeting On Hold; Completion and results: On Hold

• Workshops*: Expand FM audience and subject materials On Hold

• Communications Policy Update: Proposed policy given to Melanie and Jennifer On Hold
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 – Fourth 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

FM New Hire/Promotion 4th Quarter FY 2015

FM New Hire/Promotions Per Department 4th Quarter FY 2015

FM New Hire/Promotions Per Department 4th Quarter FY 2015

Nonexempt
Exempt

New Hire Promotion

New Hires Promotions

STATUS
Facilities Management Strategic Planning Session – Fourth 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 Nonexempt Vacancies FY 2015

Target: 80 Calendar Days
Missed by 50 Days
Facilities Management Strategic Planning Session – Fourth 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

Target: 120 Calendar Days
Missed by 92 Days

Average Number of Days to Fill Exempt (Salaried) Vacancies
FY 2015

Target: Not to Exceed 120 Calendar Days
18 Days Below
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, supervisors are requested to review with employees steps to access HRMS for their 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 us 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
Facilities Management Strategic Planning Session – Fourth 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: Percent Employees Separated before end of probationary period.

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

Separations Per Department During Probation Nonexempt FY 2015

1st Qtr = 1.19%
2nd Qtr = 0%
3rd Qtr = 1.09%
4th Qtr = 0%
Target < 5%

Separations Per Department During Probation (Salaried) Exempt FY 2015

QTR 1 | QTR 2 | QTR 3 | QTR 4
---|---|---|---
NONE | NONE | NONE | NONE

Resignation | Retirement | Termination | Death
Facilities Management Strategic Planning Session – Fourth 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: Percent Employees Terminated before end of probationary period

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

FM Total Separations Per Department
FY 2014-15 Nonexempt

Total Nonexempt Turnover Rate = .9%
Facilities Management Strategic Planning Session – Fourth 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:  
Percent Employees Terminated before end of probationary period

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

FM Total Separations Per Department FY 2014-15 Exempt

<table>
<thead>
<tr>
<th>Department</th>
<th>QTR 1</th>
<th>QTR 2</th>
<th>QTR 3</th>
<th>QTR 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>NONE</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>CAPITAL PROJECTS</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>FO</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>RECYCLING</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>FBO</td>
<td></td>
<td></td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>FO</td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
</tbody>
</table>

Status:

- Resignation
- Retirement
- Termination
- Death
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**

<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>– Trouble Shooting Mechanical Drives Systems &amp; Rotating Equipment</td>
<td>June 2015</td>
</tr>
<tr>
<td><strong>Safety</strong></td>
<td></td>
</tr>
<tr>
<td>– Supervisor Safety Talks</td>
<td>Monthly</td>
</tr>
<tr>
<td>– Forklift, Aerial &amp; Telescopic Compliance Training (EHS)</td>
<td>April 2015</td>
</tr>
<tr>
<td>– Blood Borne Pathogens (EHS)</td>
<td>May 2015</td>
</tr>
<tr>
<td><strong>Leadership</strong></td>
<td></td>
</tr>
<tr>
<td>– APPA Leadership Academy</td>
<td>May 2015</td>
</tr>
<tr>
<td>– Documentation &amp; Disciplinary Process</td>
<td>Spring 2015</td>
</tr>
<tr>
<td>– NEO redesign</td>
<td>June 2015</td>
</tr>
<tr>
<td>– Cultural IQ Training</td>
<td>TBD</td>
</tr>
<tr>
<td><strong>Externally Driven Initiatives</strong></td>
<td></td>
</tr>
<tr>
<td>– Kronos implementation/training - Sub pilot in FM building <em>(Financial services)</em></td>
<td>Jan 2015</td>
</tr>
<tr>
<td>– Niner Talent (formerly People Admin) version 7.35 upgrade/training <em>(Main HR)</em></td>
<td>July 2015</td>
</tr>
</tbody>
</table>
Facilities Management Strategic Planning Session – Fourth 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

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

- FY 2015
  Target - 1,960 hrs
  4th Qtr. Target – 490 hrs

  Actual YTD
  1303.75 hrs (67%)

  Actual 4th Qtr.
  570 hrs (116%)

ANNUAL
Facilities Management Strategic Planning Session – Fourth Quarter FY 2015

GOAL #4 Recruit, Develop and Retain Quality Employees

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

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

FY 15

Training Hours for front line employees by Quarter

FY 2015

Annual Target - 7,760 hrs
4th Qtr. Target – 1,940 hrs

Actual YTD
4167 hrs (54%)
Actual 4th Qtr.
1301.5 hrs (67%)
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

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 August 2015; Work/meetings anticipated to begin in September 2015 with a proposed 3 week maximum time commitment by members;
• Next survey to be administered in October/November 2015.
Facilities Management Strategic Planning Session – Fourth 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
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 – Fourth 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 (%)

All units are not at 87% satisfied

<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>
</tr>
<tr>
<td>Capital</td>
<td>100</td>
<td>25</td>
<td>63</td>
<td>12</td>
</tr>
</tbody>
</table>
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
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
- 5th Annual FM Safety Fair - May 6, 2015
- 7th Annual FM Safety Slogan Contest winner - “Safety Pays In Many Ways”

Compliance Training

- Periodic meetings with EH&S to review needs, processes, etc.
  - Bloodborne Pathogen training
  - Sub-Contractor Safety Program
- Research training providers/vendors to address training gaps, as needed
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

FM ACADEMY ACTION PLAN

<table>
<thead>
<tr>
<th>Action Item</th>
<th>Target Date</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Safety Training stats FY15 YTD</strong> – 2,147 hrs attended by 3,600 employees</td>
<td></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</td>
<td>Monthly</td>
</tr>
<tr>
<td>• 2015 Safety Fair</td>
<td>Annual</td>
</tr>
<tr>
<td>• Approximately 250 in attendance</td>
<td></td>
</tr>
<tr>
<td>• 21 vendors participated</td>
<td></td>
</tr>
<tr>
<td>• Fire extinguisher mini-training provided</td>
<td></td>
</tr>
<tr>
<td>• Accident/Incident totals YTD (calendar year)</td>
<td></td>
</tr>
<tr>
<td>• Accidents - 10</td>
<td>2015 YTD</td>
</tr>
<tr>
<td>• Minor incidents - 1</td>
<td>2015 YTD</td>
</tr>
<tr>
<td>• 11 year trend: <strong>2004</strong> – 45 accidents / <strong>2015</strong> – 10 accidents</td>
<td></td>
</tr>
<tr>
<td>• Compliance and/or Safety based training from EHS</td>
<td></td>
</tr>
<tr>
<td>• Blood Borne Pathogen (BBP) training</td>
<td>May 2015</td>
</tr>
<tr>
<td>• Sub-Contractor Safety Programs</td>
<td>June 2015</td>
</tr>
<tr>
<td>• Automated External Defibrillator (AED) training</td>
<td>July 2015</td>
</tr>
</tbody>
</table>

66
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>
<tbody>
<tr>
<td>• FM Academy – “visit the website”</td>
<td></td>
</tr>
<tr>
<td>– Content Development</td>
<td>Ongoing</td>
</tr>
<tr>
<td>• Recent addition - Online training evaluation form ready for launch, on approval</td>
<td></td>
</tr>
<tr>
<td>– Training vendor sourcing &amp; selection</td>
<td>As Needed/As Funded</td>
</tr>
<tr>
<td>4th Quarter Training</td>
<td></td>
</tr>
<tr>
<td>– Hosted APPA Leadership Academy (Level one)</td>
<td>May 2015</td>
</tr>
<tr>
<td>• Tentative agreement with APPA to host Levels 2 &amp; 3</td>
<td></td>
</tr>
<tr>
<td>– Troubleshooting Mechanical Drive Systems &amp; Rotating Equipment</td>
<td>Jun 2015</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

Lead:  Facilities Business Office
Balanced Scorecard Category:  Financial Perspective

ACTION PLAN

Finance/Budget:
•  Call for Recurring and One-Time funding completed on time; Total FM request approx. $13M;
•  Prepare Divisional one-time funding list for FY 16; awaiting budget call;
•  Awaiting new budget for FY 16 – General fund anticipated late Fall (November 2015); Currently operating using FY 15 budget amounts;
•  Continue to hold Budget Meetings for BES and FO Departments monthly with director and quarterly with respective leadership teams; First FY 16 meetings scheduled for week of July 20th;
•  Reinstitute capital project budget meetings with Capital team;
•  FM Budgeting 101 training development to begin in July 2015 with “color of green” sessions/meetings to be scheduled in September 2015;
•  Continue work with Budget Office to determine submission date for new operating reserve templates to the Office of State Budget and Management; Develop templates for Music Annex (Band), Medical Condos and HRL “trees”; Submission Date TBD.

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;
GOAL #6 – 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
  – Reordered SDI scanner for McEniry 020
  – Implemented Team cleaning model in all BES Zones

• Actions Planned
  – Complete logistics portion of Supply Chain Management Project in McEniry
  – Implement new Budget process for BES Zone Supervisors
  – 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
  – EPIC laundry room installation
Facilities Management Strategic Planning Session – Fourth Quarter FY 2015

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

<table>
<thead>
<tr>
<th>Institution</th>
<th>Cost/Student FTE</th>
</tr>
</thead>
<tbody>
<tr>
<td>East Carolina University</td>
<td>$204.43</td>
</tr>
<tr>
<td>Portland State University</td>
<td>$204.42</td>
</tr>
<tr>
<td>University of New Mexico</td>
<td>$227.53</td>
</tr>
<tr>
<td>University of North Carolina at Charlotte</td>
<td>$231.30</td>
</tr>
<tr>
<td>University of Texas San Antonio</td>
<td>$222.31</td>
</tr>
<tr>
<td>SRAPPA Region</td>
<td>$349.23</td>
</tr>
</tbody>
</table>

- East Carolina University
- Portland State University
- University of New Mexico
- University of North Carolina at Charlotte
- University of Texas San Antonio
- SRAPPA Region

**Average cost/student = $217.99**

**UNCC = 6.105% above average**

**UNCC = 33.774% below SRAPPA average**

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

Actions Completed

1. Identified opportunities to expand reimbursable work in an effort to support labor services funds by Nov 2014.
2. Realigned the labor services positions to ensure maximum utilization of resources by Jan 2015.
Facilities Management Strategic Planning Session – Fourth 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

Maintenance Total Cost per GSF

<table>
<thead>
<tr>
<th>Year</th>
<th>East Carolina University</th>
<th>Portland State University</th>
<th>University of Texas San Antonio</th>
<th>UNC Charlotte</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>$1.92</td>
<td>$1.42</td>
<td>$1.72</td>
<td>$2.11</td>
</tr>
<tr>
<td>2013</td>
<td>$1.88</td>
<td>$1.01</td>
<td>$1.02</td>
<td>$2.05</td>
</tr>
<tr>
<td>2014</td>
<td>$1.87</td>
<td>$1.32</td>
<td>$0.77</td>
<td>$1.94</td>
</tr>
</tbody>
</table>

2014 Peer Average
UNC Charlotte = 23.7% above Peer Average

Leading Indicator
East Carolina University = 10.9% below Peer Average

Status:
- Lead: Facilities Operations
- Lead: F. O.
Facilities Management Strategic Planning Session – Fourth 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
4th Quarter FY15

<table>
<thead>
<tr>
<th>FY 13</th>
<th>FY 14</th>
<th>FY 15 (YTD)</th>
<th>Total Qtr</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tons Landfilled</td>
<td>60.4%</td>
<td>60.4%</td>
<td>73.5%</td>
</tr>
<tr>
<td>Tons Recycled</td>
<td>400</td>
<td>400</td>
<td>1,000</td>
</tr>
</tbody>
</table>

STATUS 4th Quarter
STATUS Annual Average
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
  • Completed spring tree planting, campus cleanup, and Earth Day events
  • Completed move-out collections (13,000 lbs)
  • Began working more with HRL on plans to be able to increase recycling rates in residence halls
  • C&D Coordinator/Contract Administrator position posted and closed
  • Replaced plastic recycling bins with campus standard in most areas

1st Quarter Actions Planned
  • Interviews and hiring for C&D Coordinator (Interviews complete)
  • 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)
  • Prepare for Football season (signage, volunteer plan, materials sorting, training staff)
  • Expand green events and explore going zero waste at basketball
  • Continue working with FIS to update recycling location map
Facilities Management Strategic Planning Session – Fourth Quarter FY 2015

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

Balanced Scorecard Category: Innovation and Learning Perspective

Breakdown of Solid Waste

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Total Solid Waste</th>
<th>Total Waste Diverted</th>
</tr>
</thead>
<tbody>
<tr>
<td>Baseline 4th Qtr FY08</td>
<td>695 tons</td>
<td>198 tons</td>
</tr>
<tr>
<td>1st Qtr FY15</td>
<td>765 tons</td>
<td>313 tons</td>
</tr>
<tr>
<td>2nd Qtr FY15</td>
<td>787 tons</td>
<td>310 tons</td>
</tr>
<tr>
<td>3rd Qtr FY15</td>
<td>755 tons</td>
<td>248 tons</td>
</tr>
<tr>
<td>4th Qtr FY15</td>
<td>866 tons</td>
<td>433 tons</td>
</tr>
</tbody>
</table>

Annual Solid Waste Comparison

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

- Assess additional actions list for achieving STARS Silver (completed – documentation actions only).
- Achieve silver rating by end of FY 15 (Submission in August).
Facilities Management Strategic Planning Session – Fiscal Year Recap

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
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

- Work with SCO to revise new Prequalification Policy
- Establish project specific participation goals for single prime projects
  - CID Phase 2 Campus Wi-Fi – 10% goal – *Goal Exceeded*
- Review *GFE* documentation for compliance before 1st tier subcontracts are awarded
- Work with internal/external groups to identify skilled HUB contractors
**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

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**ACTION PLAN**

**Cost Accounting:**

- 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;
    - Home Org completed for KRONOS pilot;
    - Timesheet org complete
    - 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.
  - Reviewing budget revision process departmental wide to begin July 2015 – will not be completed until the new FY 16 budget has been allocated by the AVC;
  - Review changes to approvals for 49er Mart to be reviewed and completed in July 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 16 to improve and monitor use of account codes across FM;
- APPA Survey – Data gathering for the FY 15 APPA FPI Survey to begin in August 2015; **Due September 18th**
GOAL #5  Promote Good Stewardship

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

**Lead:** Facilities Business Office
**Balanced Scorecard Category:** Financial Perspective

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**FY 2015 Budget Report:**
**Percentage of YTD Expenditures**

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Base Operations</td>
<td>96.0</td>
</tr>
<tr>
<td>BA-OT</td>
<td>95.0</td>
</tr>
<tr>
<td>Emergency Fund</td>
<td>99.97</td>
</tr>
</tbody>
</table>
Facilities Management Strategic Planning Session – Fourth Quarter FY 2015

GOAL #5 Promote Good Stewardship

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

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

Objective 5.1: Promote Fiscal Responsibility
Tactic 5.1.3: 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 15 APPA Survey:

- Data collection for FY 15 survey is anticipated to occur in July 2015; APPA to be contacted regarding date during second week of July;
- Upon opening of survey, questions will be reviewed; participants (data providers) will be given a heads up and the survey questions will be delivered.
- Anticipated due date for data is September 18th, 2015.
Facilities Management Strategic Planning Session – Fourth Quarter FY 2015

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

An annual chart showing the Administration Total Cost per GSF for several institutions, including East Carolina University, Portland State University, University of North Carolina Charlotte, University of Texas San Antonio, and UNC Charlotte. The chart indicates that the Overall APPA Avg. is $0.55, SRAPPA Avg. is $0.44, Target is $0.404 (-5%), and UNC Charlotte is $0.40.
Facilities Management Strategic Planning Session – Fourth 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

2012 2013 2014
East Carolina University $5.12 $5.70 $5.67
Portland State University $6.71 $6.30 $7.03
University of Texas San Antonio $1.72 $2.14 $1.04
UNC Charlotte $3.30 $3.31 3.46

2014 Peer Average $4.30
UNC Charlotte = 19.5% below Peer Average
Facilities Management Strategic Planning Session – Fourth 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

$548,311.70 (26.1% Goal Met)
$316,394.20 (15.1% Goal Met)
$654,165.82 (31.2% Goal Met)
$564,176.61 (27% Goal Met)

$2.1M (100%)
Facilities Management Strategic Planning Session – Fourth 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
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

- Applying 7 themes for implementing best practices:
  1. Assessment (August STARS Submission)
  2. Faculty Development for Curriculum (Completed May Workshop for Faculty)
  3. Campus as a Laboratory (CGI: $28k for studies, supplies)
  4. Outreach Communications (CGI: $5k for signs)
  5. Design Standards (CGI: $92k for biking, water, recycling, gardens, etc.)
  6. Standard Operating Procedures (CGI: $15k for EV monitoring)
  7. Purchasing Practices (Start new Task Force)

- Reached 61% of best practices implemented by July 2015 (COMPLETED):
  - New: In-house certifications (e.g. Green Office)
  - Next: 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 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**

- 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 Sep.
  - Pedestrian Lights to be replaced as funds become available – start with campus core.
- New Goal of 35% reduction by 2020
Facilities Management Strategic Planning Session – 4th QTR FY 2015

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

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 – Fiscal Year Recap

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
Fiscal Years Recap

80% GOAL

- Total Projects Completed
- Projects with 12% HUB Participation
Facilities Management Strategic Planning Session – Fourth 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 Chart]

- 5% GOAL
- Total Capital Project Dollars
- Capital Project Dollars w/African American Firms

<table>
<thead>
<tr>
<th>1stQtr15</th>
<th>2ndQtr15</th>
<th>3rdQtr15</th>
<th>4thQtr15</th>
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<tr>
<td>$0</td>
<td>$5,000,000</td>
<td>$10,000,000</td>
<td>$15,000,000</td>
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<td>0%</td>
<td>8%</td>
<td>4%</td>
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Facilities Management Strategic Planning Session – Fourth 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

15% GOAL

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

38% 56% 34% 64% 52%
Facilities Management Strategic Planning Session – Fourth 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 of all HUB participation on all Informal Projects below $30,000 (Construction only) divided by Total Contract Dollars

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>
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<tr>
<td>FY '11</td>
<td>$ 3,924,102</td>
<td>$ 857,125</td>
<td>21.8%</td>
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<tr>
<td>FY '12</td>
<td>$ 2,878,027</td>
<td>$ 891,793</td>
<td>31.0%</td>
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<tr>
<td>FY '13</td>
<td>$ 2,891,003</td>
<td>$ 902,065</td>
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<tr>
<td>FY '14</td>
<td>$ 1,863,533</td>
<td>$ 700,603</td>
<td>37.6%</td>
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<tr>
<td>QTR 1</td>
<td>$ 495,625</td>
<td>$ 150,457</td>
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<tr>
<td>QTR 2</td>
<td>$ 296,965</td>
<td>$ 105,061</td>
<td>35.4%</td>
</tr>
<tr>
<td>QTR 3</td>
<td>$ 937,226</td>
<td>$ 464,038</td>
<td>49.5%</td>
</tr>
<tr>
<td><strong>QTR 4</strong></td>
<td>$ 926,066</td>
<td>$ 430,838</td>
<td><strong>46.5%</strong></td>
</tr>
<tr>
<td><strong>FY '15 STATUS</strong></td>
<td><strong>$ 2,655,882</strong></td>
<td><strong>$ 1,150,394</strong></td>
<td><strong>43.3%</strong></td>
</tr>
</tbody>
</table>

YTD STATUS 43.3%
Annual GOAL 13.0%
4th QTR. STATUS 46.5%

13% Overall HUB Participation – Summary Graph
Facilities Management Strategic Planning Session – Fourth 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 of all HUB Contract Dollars on all Informal Projects below $30,000 *(Construction only)* divided by Total Contracts Dollars

| Tactic 5.4.5: | 3% African American participation on Informal projects below $30,000
| Measure: | Total African American Contract Dollars on all Projects below $30,000 *(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.

- First and Second Quarters of FY-2016: Concentrated effort to bring in new contractors to present their qualifications at our weekly Design Services Team Meetings

Design Services and Facilities Information Systems are working to improve HUB reporting of contractors and 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 - Ongoing.

- Project Coordinators continue to review and discuss HUB contractors and vendors at Design Services weekly meetings.
Facilities Management Strategic Planning Session – Fourth 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 on all Projects below $30,000 (Construction only) 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>
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<td>$46,475</td>
<td>1.6%</td>
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<td>$2,891,003</td>
<td>$115,219</td>
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<td>QTR 1</td>
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<td>QTR 2</td>
<td>$296,965</td>
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<td>QTR 3</td>
<td>$937,226</td>
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<td>FY '15 STATUS</td>
<td>$2,655,882</td>
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<td>1.8%</td>
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3% African American Participation – Summary Graph