Facilities Management

Strategic Planning Session
Second Quarter – Fiscal Year 2011
January 27, 2011

...Creating a Campus of Distinction...
"In business, words are words, explanations are explanations, promises are promises, but only performance is reality."

-- Harold Geneen, industrialist

GOAL #1

Improve Maintenance and Operation on the Campus
GOAL #2

Successfully Adapt Existing Facilities to Meet New Requirements

"Careful planning helps us maintain a sense of perspective, purpose and ordered priorities."

-- Stephen Covey, Author and Speaker
"The greater danger for most of us lies not in setting our aim too high and falling short, but in setting our aim too low and achieving our mark."

-- Michelangelo, Artist

**GOAL #3**

Deliver New Facilities that Support the University’s Mission
“People don’t want to communicate with an organization or a computer. They want to talk to a real, live, responsive, responsible person who will listen and help them get satisfaction.”

- Theo Michelson, State Farm Insurance

GOAL #4

Perfect a Customer Focused Organization
GOAL #5

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

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

-- Calvin Coolidge, 30th U.S. president
The more positive you are when you think and work toward your goals, the faster you achieve them.

-- Brian Tracy, Speaker, Author, Consultant

GOAL #6

Promote Good Stewardship
Balance Score Card

CUSTOMER Perspective

Strategic Objectives:

Work Request Process, Housekeeping Processes,
Improve Process Reliability, Increase On-Time Delivery,
Informal Project Administration,
Enhance Customer Satisfaction
GOAL #1 - Improve maintenance and operations of the Campus

**Strategy:** 1.3  Improve Work Request Process

**Objective:** 1.3.1  Decrease Percentage of Reactive Work Requests to less than 58%

**Measure:** Percentage (Number of reactive work requests divided by total number of work requests including PM and predictive work requests)  
(APPA Benchmark)

**Balanced Scorecard Category:** Customer Perspective

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**Reactive Maintenance as % of All Work Requests**  
(Includes Reactive, PM and PdM)

- 1st Qtr FY11: 58.62%
- 2nd Qtr FY11: 56.60%
- 3rd Qtr FY11: 0.00%
- 4th Qtr FY11: 0.00%
- Average FY 11 (year-to-date): 57.61%

Goal < 58%
GOAL #1 - Improve Facilities Operations

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

ACTI ON PLAN

• Actions Complete
  1 – Reviewed Roofing PM’s – added missing PMs.

• Actions Planned
  1 – Continue to build PM program to cover all equipment.
    a) Meet with Automotive group
    b) Meet with Grounds Mechanics
    c) Continue work with Auxiliary Services
  2 – Continue increasing predictive maintenance measures as funds permit.
  3 – Continue review of reactive work requests for routine services that should be moved to “scheduled services,” or PM.
Facilities Management Strategic Planning Session Second Quarter FY 2011

GOAL #1 - Improve maintenance and operations of the Campus

Strategy: 1.3 Improve Work Request Process
Objective: 1.3.2 Decrease Work Request Cycle Time by 25% or < 300 hours

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

Balanced Scorecard Category: Customer Perspective
GOAL #1 – Improve Facilities Operations

Strategy: 1.3  Improve Work Request Process
Objective: 1.3.2  Decrease Non-emergency Work Request Cycle Time by 25% or < 300 hours

ACTION PLAN

Actions Complete
1 – Continued emphasis on over 14 day and 30 day reports by supervisors and managers.
2 – Continued review of unassigned WR’s by supervisors and managers.
3 – Continued review of PM and other work assignments and completions with technicians.

Actions Planned
1 - Review the manner in which data is used to calculate cycle time with FIS to ensure no negative numbers and improve accuracy.
2 - Re-emphasize Policy II-16 for Timely and Accurate Handling/Processing of WRs.
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GOAL #1 - Improve Maintenance and Operations of the Campus

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

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

Balanced Scorecard Category: Customer Perspective

APPAs LEVELS

28 of 31 buildings were at Level 2 or below (90%)
GOAL #1 – Improve Maintenance and Operations

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

ACTION PLAN

• Actions Complete
  – All buildings not in renovation audited (self audit)
  – Changed chart to reflect summary data for last four quarters

• Actions Planned
  – Continue quarterly self audits
  – Write RFP for external benchmark analysis
  – Establish subject matter expert training position for housekeeping
Facilities Management Strategic Planning Session - Second Quarter FY 2011

GOAL #1 - Improve maintenance and operations of the Campus

Strategy: 1.5  Improve Reliability
Objective: 1.5.3  Reduce Unscheduled High Voltage Electrical System Outages by 10%

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

Balanced Scorecard Category: Customer Perspective

Unscheduled High Voltage Electrical System Outages
148,512 Building Utility Hours/Quarter Available

- Goal ≤ 0.3 or 44.5 Bldg. Utility Hrs.
- Light = Total
- Dark = Unplanned
GOAL #1 - Improve Facilities Operations

Strategy: 1.5  Improve Reliability
Objective: 1.5.3  Reduce Unscheduled High Voltage Electrical System Outages by 10%

ACTION PLAN

• Actions Complete
  1 – Completed PM’s as scheduled.
  2 – Continued working closely with Project Managers and contractors performing work on-site to preclude accidental interruptions by properly identifying location of underground utilities.
  3 - Identified several switches needing replacement and prepared estimates for planning.
  4 – Repaired terminations in Colvard South switch 22-B.

• Actions Planned
  1 – Continue PM’s.
  2 – Prepare program for major equipment repairs and replacement.
  3 – Review system projects identified on the R&R list and prioritize. Indicate urgency and recommend future funding dates.
  4 – Preparing estimates for replacement of switches 42A-B and 42B-B.
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GOAL #1 - Improve maintenance and operations of the Campus

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

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

Balanced Scorecard Category: Customer Perspective

Unscheduled Fire Alarm Network Outages
148,512 Building Alarm Hours/Quarter
Available

Dark - Unplanned Down Time  Light - Total Down Time

Goal ≤ 3% (4,455 Bldg. Alarm Hrs.)

STATUS
GOAL #1 – Improve Facilities Operations

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

ACTI ON PLAN

Actions Complete
1 – Worked closely with Simplex-Grinnell performing work on-site to alleviate accidental interruptions.
2 – Prepared data monitoring program for quarterly reporting.

Actions Planned
1 – Continue working with Simplex to bring the last buildings online with the network.
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GOAL #2 - Successfully Adapt Existing Facilities to Meet New Requirements

Strategy 2.2  Improve Informal Project Design and Construction Process
Objective 2.2.1  95% of Projects Designed on Time

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

Balanced Scorecard Category: Customer Perspective

<table>
<thead>
<tr>
<th>QUARTERLY REVIEW</th>
<th>No. Of Projects Designed</th>
<th>Project Design Completed by Delivery Date</th>
<th>Project Design Not Completed On Time</th>
<th>Designed On Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY ’08</td>
<td>65</td>
<td>55</td>
<td>10</td>
<td>84.6%</td>
</tr>
<tr>
<td>FY ’09</td>
<td>115</td>
<td>112</td>
<td>3</td>
<td>97.4%</td>
</tr>
<tr>
<td>FY ’10</td>
<td>173</td>
<td>170</td>
<td>3</td>
<td>98.3%</td>
</tr>
<tr>
<td>QTR 1</td>
<td>49</td>
<td>49</td>
<td>0</td>
<td>100.0%</td>
</tr>
<tr>
<td>QTR 2</td>
<td>64</td>
<td>64</td>
<td>0</td>
<td>100.0%</td>
</tr>
<tr>
<td>QTR 3</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.0%</td>
</tr>
<tr>
<td>QTR 4</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.0%</td>
</tr>
<tr>
<td>FY ’11 STATUS</td>
<td>113</td>
<td>113</td>
<td>0</td>
<td>100.0%</td>
</tr>
</tbody>
</table>

**GOAL STATUS**

- FY ’08: 75%
- FY ’09: 95%
- FY ’10: 95%
- QTR 1: 100.0%
- QTR 2: 100.0%
- QTR 3: 0.0%
- QTR 4: 0.0%
- FY ’11 STATUS: 100.0%
GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

Strategy  2.2  Improve Informal Project Design and Construction Process
Objective  2.2.1  95% of Projects Designed on Time

ACTION PLAN

2.2.1 - Actions Completed:

☑ Project Priority List upgrades.

2.2.1 - Actions Planned:

☐ Continue refining reports from Archibus used to collect information for Strategic Planning - on going.

☐ Complete Classroom Capacity info and egress data by developing Building Capacity standards - on going.

☐ Embrace new SCO procedural steps and secure project approvals and inspections - on going.

☐ New "Wildly Important Goal" - handout guiding Customers through Design Services' project processes and Archibus.
Facilities Management Strategic Planning Session - Second Quarter FY 2011

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

Strategy 2.2 Improve Informal Project Design and Construction Process
Objective 2.2.2 85% of Estimates for All Construction within +/- 10% of Actual.

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

Balanced Scorecard Category: Customer Perspective

<table>
<thead>
<tr>
<th>QUARTERLY REVIEW</th>
<th>No. Of Projects Estimated</th>
<th>Projects Estimated within +/- 10%</th>
<th>Projects Not Estimated within +/- 10%</th>
<th>Estimates within +/- 10%</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY '08</td>
<td>65</td>
<td>47</td>
<td>18</td>
<td>72.3%</td>
</tr>
<tr>
<td>FY '09</td>
<td>115</td>
<td>101</td>
<td>14</td>
<td>87.8%</td>
</tr>
<tr>
<td>FY '10</td>
<td>255</td>
<td>244</td>
<td>11</td>
<td>95.7%</td>
</tr>
<tr>
<td>QTR 1</td>
<td>31</td>
<td>30</td>
<td>1</td>
<td>96.8%</td>
</tr>
<tr>
<td>QTR 2</td>
<td>36</td>
<td>32</td>
<td>4</td>
<td>88.9%</td>
</tr>
<tr>
<td>QTR 3</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.0%</td>
</tr>
<tr>
<td>QTR 4</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.0%</td>
</tr>
<tr>
<td>FY '11 STATUS</td>
<td>67</td>
<td>62</td>
<td>5</td>
<td>92.5%</td>
</tr>
</tbody>
</table>

Graph showing the percentage of estimates within +/- 10% for different periods, with FY '11 Status at 92.5%.
GOAL #2 - Successfully Adapt Existing Facilities to Meet New Requirements

Strategy 2.2 Improve Informal Project Design and Construction Process
Objective 2.2.2 85% of Estimates for in house construction within +/- 10% of Actual.

ACTION PLAN

2.2.2 - Actions Completed:

☑ Completed Scope and Budget upgrades to provide more accurate estimates.

2.2.2 - Actions Planned:

☐ Continue assigning staff review processes for internal team analysis (Mac's #2 WIG) - on going.

☐ Continue Project Coordinator's tracking of expended project costs - on going.
Facilities Management Strategic Planning Session - Second Quarter FY 2011

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

Strategy 2.2 Improve Informal Project Design and Construction Process
Objective 2.2.4 90% of All Construction Projects Meet Scheduled Beneficial Occupancy Date (BOD)

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

Balanced Scorecard Category: Customer Perspective

90% of All Projects Meet Scheduled Beneficial Occupancy Date (BOD) - 2.2.4

<table>
<thead>
<tr>
<th>QUARTERLY REVIEW</th>
<th>No. of Projects</th>
<th>No. of met Beneficial Occupancy</th>
<th>No. that did not meet Delivery Date</th>
<th>Completed On Time</th>
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<tbody>
<tr>
<td>FY '08</td>
<td>190</td>
<td>139</td>
<td>51</td>
<td>73.2%</td>
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<tr>
<td>FY '09</td>
<td>116</td>
<td>104</td>
<td>12</td>
<td>89.7%</td>
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<tr>
<td>FY '10</td>
<td>182</td>
<td>164</td>
<td>18</td>
<td>90.1%</td>
</tr>
<tr>
<td>QTR 1</td>
<td>31</td>
<td>31</td>
<td>0</td>
<td>100.0%</td>
</tr>
<tr>
<td>QTR 2</td>
<td>36</td>
<td>34</td>
<td>2</td>
<td>94.4%</td>
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<td>QTR 3</td>
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<td>QTR 4</td>
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<tr>
<td>FY '11 STATUS</td>
<td>67</td>
<td>65</td>
<td>2</td>
<td>97.0%</td>
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</table>
GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

Strategy 2.2  Improve Informal Project Design and Construction Process
Objective 2.2.4  90% of In-house Construction Projects Meet Scheduled Beneficial Occupancy Date (BOD)

ACTION PLAN

2.2.4 - Actions Completed:

☑ Project schedules from Scope & Budget, Design and Construction through Closeout.

2.2.4 - Actions Planned:

☐ Continue to establish proven steps to beneficial occupancy via departmental meetings - on going.

☐ New "Wildly Important Goal" - Customer involvement with project Punch List process.

☐ Post construction schedules on website to increase awareness of project timelines.
Facilities Management Strategic Planning Session - Second Quarter FY 2011

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

Strategy 2.2  Improve Informal Project Design and Construction Process

Objective 2.2.6  Increase Project Volume by 10 projects per year - Project Counts by Phase

Measure:  The 2008 Benchmark is 200 projects.

Balanced Scorecard Category:  Customer Perspective

<table>
<thead>
<tr>
<th>GOAL</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
<th>8</th>
<th>9</th>
<th>10</th>
<th>11</th>
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<tbody>
<tr>
<td>Goal FY 2003</td>
<td>150</td>
<td>160</td>
<td>170</td>
<td>180</td>
<td>190</td>
<td>200</td>
<td>210</td>
<td>220</td>
<td>230</td>
<td>240</td>
<td>250</td>
</tr>
<tr>
<td>Goal FY 2004</td>
<td>136</td>
<td>161</td>
<td>173</td>
<td>194</td>
<td>205</td>
<td>190</td>
<td>115</td>
<td>182</td>
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<table>
<thead>
<tr>
<th>Project Dollars</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
<th>8</th>
<th>9</th>
<th>10</th>
<th>11</th>
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<tbody>
<tr>
<td>FY 2003</td>
<td>$2,060,000</td>
<td>$2,609,000</td>
<td>$3,450,000</td>
<td>$8,480,000</td>
<td>$8,875,000</td>
<td>$8,200,000</td>
<td>$7,477,000</td>
<td>$9,111,289</td>
<td>$1,797,282</td>
<td></td>
<td></td>
</tr>
<tr>
<td>FY 2004</td>
<td>$15,147</td>
<td>$16,205</td>
<td>$19,942</td>
<td>$43,711</td>
<td>$43,293</td>
<td>$43,158</td>
<td>$65,017</td>
<td>$50,062</td>
<td>$34,563</td>
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</table>

<table>
<thead>
<tr>
<th>AVG$/Project</th>
<th></th>
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<tbody>
<tr>
<td>FY 2003</td>
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<tr>
<td>FY 2004</td>
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</tbody>
</table>

Increased Project Volume

- GOAL 100%
- Status 22.6%

25
GOAL #2 - Successfully Adapt Existing Facilities to Meet New Requirements

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

ACTION PLAN

2.2.6 - Actions Completed:

☑ Project Priority List upgrades.
☑ Project schedules from Scope & Budget, Design and Construction through Closeout.

2.2.6 - Actions Planned:

☐ Complete Classroom Capacity info and egress data by developing Building Capacity standards - on going.
☐ Embrace new SCO procedural steps and secure project approvals and inspections - on going.
☐ New "Wildly Important Goal" - handout guiding Customers through Design Services' project processes and Archibus.
☐ New "Wildly Important Goal" - Customer involvement with project Punch List process.
☐ Post construction schedules on website to increase awareness of project timelines.
Facilities Management Strategic Planning Session - Second Quarter FY 2011

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

<table>
<thead>
<tr>
<th>Strategy</th>
<th>Objective</th>
<th>Measure</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.4</td>
<td>3.4.1</td>
<td>90% of Capital Construction Projects completed on time</td>
</tr>
</tbody>
</table>

Balanced Scorecard Category: Customer Perspective

<table>
<thead>
<tr>
<th>STRATEGIC REVIEW by Fiscal Year (July-June)</th>
<th>% completed on schedule</th>
<th>% completed on time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summary FY-09</td>
<td>4</td>
<td>2</td>
</tr>
<tr>
<td>Summary FY-10</td>
<td>6</td>
<td>0</td>
</tr>
<tr>
<td>1st Qtr. FY-11</td>
<td>4</td>
<td>0</td>
</tr>
<tr>
<td>2nd Qtr. FY-11</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>3rd Qtr. FY-11</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4th Qtr. FY-11</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Objective for 2nd Quarter is 0%
Year to date is 50%
**ACTION PLAN**

- **Actions Complete**
  - 1. Obtained close-out documents for Student Union

- **Actions Planned**
  - 1. Complete BSL Lab in Bioinformatics and obtain close-out documents
  - 2. Complete punch list for Tennis Phase I
  - 3. Complete construction of New Outdoor Recreational Fields & Prospector Phase II
  - 4. Complete construction of Residence Hall Phase 10 & Center City Classroom
  - 5. Begin construction of Tennis Phase II, Motorsports and Parking Deck I
Facilities Management Strategic Planning Session - 2nd Quarter FY 2011

GOAL #4 - Perfect a Customer Focused Organization

Strategy 4.1 Continually Improve Customer Service/Satisfaction
Objective 4.1.1 Achieve Overall FM Customer Satisfaction of 85%

Measure: Annual Customer Survey Results: Percentage of customers agreeing or strongly agreeing with the statement: “Overall I am satisfied with the service I received from Facilities Management.”

Balanced Scorecard Category: Customer Perspective

Overall Satisfaction with Facilities Management Services

Goal = 85%

<table>
<thead>
<tr>
<th>Year</th>
<th>Overall Satisfaction (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY 2008</td>
<td>N/A</td>
</tr>
<tr>
<td>FY 2009</td>
<td>69</td>
</tr>
<tr>
<td>FY 2010</td>
<td>89</td>
</tr>
</tbody>
</table>
GOAL #4 - Perfect a Customer Focused Organization

Strategy  4.1  Continually Improve Customer Service/Satisfaction
Objective  4.1.1  Achieve Overall FM Customer Satisfaction of 85%

ACTION PLAN

• Actions Complete
  ✓ Leadership Team to review results on July 27th.
  ✓ Focused strategic planning session to be held on July 30th, 2010 with consultant, Juanita Coston.

• Actions Planned
GOAL #4 - Perfect a Customer Focused Organization

Strategy 4.1  Continually Improve Customer Service/Satisfaction
Objective 4.1.2  Achieve overall FM Unit Customer Satisfaction of 85%
(Units are Motor Fleet, M&O, Housekeeping, Recycling, Grounds, and Billing/FBO)

Measure:  Annual Customer Survey Results

Balanced Scorecard Category:  Customer Perspective

Unit Customer Satisfaction Survey Rating Comparison (%)

Goal = 85%

Motorfleet  84  93
Business Office  59  89
M&O Repairs  66  89
Housekeeping  65  82
Recycling  87  96
Grounds  84  91

2008 Rating (%)
2010 Rating (%)
GOAL #4 – Perfect a Customer Focused Organization

Strategy 4.1 Continually Improve Customer Service/Satisfaction
Objective 4.1.2 Achieve overall FM Unit Customer Satisfaction of 85%
(Units are Motor Fleet, M&O, Housekeeping, Recycling, Grounds, and Billing/FBO)

ACTION PLAN

• Actions Planned
  ✓ Facilities Business Office:
    ✓ Development of new Customer Information page on FBO website; Work pre-empted by 49er Mart go-live;
    ✓ Requested communication officer position. This position is becoming more common amongst Facilities organizations across the country. Request on hold due to current budget climate, funding constraints and hiring freeze.
Facilities Management Strategic Planning Session - Second Quarter FY 2011

GOAL #4 - Perfect a Customer Focused Organization

Strategy 4.1 Continually Improve Customer Service/Satisfaction
Objective 4.1.3 Decrease the Number of Hot/Cold Calls by 10% from FY10 Average of 148 (Goal = 133)

Measure: Number of hot/cold calls submitted on work requests. (Cold-131 vs 108 last fiscal year; Hot-83 vs 76 last fiscal year)

Goal: Less than 133 per quarter annual average

Balanced Scorecard Category: Customer Perspective
GOAL #4 – Perfect a Customer Focused Organization

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

**ACTION PLAN**

- **Actions Complete**
  1. Created new problem type “HVAC-TEMPOK” for editing work requests that have requested a too hot or too cold that are found within the proposed standards.

- **Actions Planned**
  1. Stay abreast of ESCO contract and ensure comfort is not sacrificed for energy.
  2. See what ESCO’s might recommend that would improve comfort and seek wider application.
Facilities Management Strategic Planning Session - Second Quarter FY 2011

GOAL #4 - Perfect a Customer Focused Organization

**Strategy**: 4.1 Continually improve customer service/satisfaction

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

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

**Balanced Scorecard Category**: Customer Perspective

---

### 90% of Informal Project Customers Satisfied or Very Satisfied with services Received

<table>
<thead>
<tr>
<th>QUARTERLY SURVEY</th>
<th>Number of Projects Surveyed</th>
<th>Very Satisfied 4</th>
<th>Satisfied 3+</th>
<th>Neutral 2+</th>
<th>Somewhat Dissatisfied 1+</th>
<th>Unsatisfied 0+</th>
<th>Percent Satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY ’08</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.0%</td>
</tr>
<tr>
<td>FY ’09</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.0%</td>
</tr>
<tr>
<td>FY ’10</td>
<td>30</td>
<td>18</td>
<td>5</td>
<td>6</td>
<td>1</td>
<td>0</td>
<td>76.7%</td>
</tr>
</tbody>
</table>

| QTR 1            | 4                           | 3               | 1           | 0         | 0                      | 0             | 100.0%           |
| QTR 2            | 11                          | 8               | 2           | 0         | 1                      | 0             | 90.9%            |
| QTR 3            | 0                           | 0               | 0           | 0         | 0                      | 0             | 0.0%             |
| QTR 4            | 0                           | 0               | 0           | 0         | 0                      | 0             | 0.0%             |

**FY ’11 STATUS**: 15 11 3 0 1 0 93.3%

**GOAL**: 90.0%
GOAL #4 – Perfect a Customer Focused Organization

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

ACTION PLAN

4.1.1 - Actions Completed:

☑  "Go live" with Customer Satisfaction Surveys

4.1.1 - Actions Planned:

☐  Review Customer Satisfaction Survey responses and implement appropriate actions.
Facilities Management Strategic Planning Session - Second Quarter FY 2011

GOAL #4 - Perfect a Customer Focused Organization

Strategy 4.1 Continually Improve Customer Service/Satisfaction
Objective 4.1.5 85% of Capital Project Customers Satisfied or Very Satisfied at the end of the design phase

Measure: Results from Interactive Web-based Customer Questionnaire.

Balanced Scorecard Category: Customer Perspective

<table>
<thead>
<tr>
<th>STRATEGIC REVIEW by Fiscal Year (July-June)</th>
<th>No. of Questionnaire Customers</th>
<th>Satisfied with Customer Service</th>
<th>Not Satisfied with Customer Service</th>
<th>% of Satisfied Customers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summary FY-09</td>
<td>2</td>
<td>1</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>Summary FY-10</td>
<td>9</td>
<td>0</td>
<td>0</td>
<td>No Data</td>
</tr>
<tr>
<td>1st Qtr. FY-11</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>No Data</td>
</tr>
<tr>
<td>2nd Qtr. FY-11</td>
<td>4</td>
<td>2</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>3rd Qtr. FY-11</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>4th Qtr. FY-11</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
</tbody>
</table>

No data is a result of customer not answering questionnaire

% customers satisfied at end of design

Goal 85%
GOAL #4 – Perfect a Customer Focused Organization

Strategy 4.1  Continually Improve Customer Service/Satisfaction
Objective 4.1.5  85% of Capital Project Customers Satisfied or Very Satisfied at the end of the design phase

ACTION PLAN

• Actions Complete
  – 1. Submitted surveys to customers for Parking Deck H, Motorsports II, Pedestrian Bridge, Tennis Courts. Responses from two customers only.

• Actions Planned
  – 1. Need to submit satisfaction survey to customers on:
     Parking Deck I, Residence Hall Fire Moore & Sanford
Facilities Management Strategic Planning Session - Second Quarter FY 2011

GOAL #4 – Perfect a Customer Focused Organization

Strategy 4.1 Continually Improve Customer Service/Satisfaction

Objective 4.1.6 85% of Capital Project Customers Satisfied or Very Satisfied at the end of the construction phase

Measure: Results from Interactive Web-based Customer Questionnaire.

Balanced Scorecard Category: Customer Perspective

<table>
<thead>
<tr>
<th>STRATEGIC REVIEW by Fiscal Year (July-June)</th>
<th>No. of Questionnaire Customers</th>
<th>Satisfied with Customer Service</th>
<th>Not Satisfied with Customer Service</th>
<th>% of Satisfied Customers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summary FY-09</td>
<td>no data</td>
<td>0</td>
<td>0</td>
<td>0.0%</td>
</tr>
<tr>
<td>Summary FY-10</td>
<td>5</td>
<td>1</td>
<td>0</td>
<td>20.0%</td>
</tr>
<tr>
<td>1st Qtr. FY-11</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.0%</td>
</tr>
<tr>
<td>2nd Qtr. FY-11</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0.0%</td>
</tr>
<tr>
<td>3rd Qtr. FY-11</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4th Qtr. FY-11</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

No data for 2nd Qtr.
## GOAL #4 - Perfect a Customer Focused Organization

<table>
<thead>
<tr>
<th>Strategy</th>
<th>4.1</th>
<th>Continually Improve Customer Service/Satisfaction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Objective</td>
<td>4.1.6</td>
<td>85% of Capital Project Customers Satisfied or Very Satisfied at the end of the construction phase</td>
</tr>
</tbody>
</table>

### ACTION PLAN

- **Actions Complete**
  - 1. Administered satisfaction survey to Pedestrian Bridge customers. No response received resulting in no data

- **Actions Planned**
  - 1. Administer satisfaction survey to Tennis Phase I customers
Facilities Management Strategic Planning Session - Second Quarter FY 2011

NEW Customer Work Request Satisfaction

**Strategy**
Improve Customer Satisfaction with Work Request System

**Objective**
Provide a Positive Customer Experience

**Measure:**
Archibus Survey Results - Survey is open for the year and results will be reported as the year progresses.

**Goal:**
All measures on survey positive. Less than 2% Strongly Disagree and 5% Disagree or Neutral.

**Balanced Scorecard Category:** Customer Perspective

<table>
<thead>
<tr>
<th>Worksite left Satisfactory</th>
<th>Work Satisfactory</th>
<th>Treated Courteously</th>
<th>Response was Timely</th>
<th>Easy to get Service</th>
</tr>
</thead>
<tbody>
<tr>
<td>SD D N A SA</td>
<td>SD D N A SA</td>
<td>SD D N A SA</td>
<td>SD D N A SA</td>
<td>SD D N A SA</td>
</tr>
<tr>
<td>0 3</td>
<td>1 13</td>
<td>12 39</td>
<td>12 41</td>
<td>0 0 2 14 36</td>
</tr>
<tr>
<td>5 10 15 20 25 30 35 40 45</td>
<td>0 3</td>
<td>0 0 0 12</td>
<td>1 0 2</td>
<td>1 2 13</td>
</tr>
</tbody>
</table>

**STATUS**
GOAL NEW Customer Satisfaction

ACTION PLAN

• Actions Complete
  1 - Reopened survey
  2 - Continued monitoring of active work requests by Supervisors and Managers.

• Actions Planned
  1 - Review ease of use with building liaisons and other customers.
  2 - Open more information on work requests for customer’s viewing to allow them to see craftsperson notes and status of their work requests.
### Balance Score Card

#### DISCUSSION

#### CUSTOMER PERSPECTIVE

<table>
<thead>
<tr>
<th>Perspective</th>
<th>Strategic Objective</th>
<th>Goal</th>
<th>Lag Measures/Lead Measures</th>
<th>Target</th>
<th>Actual</th>
<th>1st Quarter</th>
<th>2nd Quarter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>To achieve our vision, how must we view &amp; treat our customers?</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Work Request Process</td>
<td>1.3.1</td>
<td>Reactive Maintenance work requests</td>
<td>&lt;58%</td>
<td>57.6%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>1.3.2</td>
<td>Decrease Work Request Cycle Time by 25%</td>
<td>&lt;300 hrs</td>
<td>202</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Housekeeping Processes</td>
<td>1.4.1</td>
<td>Achieve APPA Level 2 in 98% of Buildings</td>
<td>98%</td>
<td>90%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Improve Process Reliability</td>
<td>1.5.3</td>
<td>Reduce Unscheduled HV outages by 10%</td>
<td>&lt;=0.3%</td>
<td>0.19%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>1.5.4</td>
<td>Reduce Unscheduled FA Network Outages by 10%</td>
<td>&lt;=3%</td>
<td>2.9%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Increase on-time delivery</td>
<td>2.2.1</td>
<td>95% of Projects Designed on Time</td>
<td>95%</td>
<td>100%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Informal Project Administration</td>
<td>2.2.2</td>
<td>All IP construction estimates</td>
<td>85% w/in 10% actuals</td>
<td>92.5%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>2.2.3</td>
<td>Combined with 2.2.2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>2.2.4</td>
<td>All IP construction meets BOD</td>
<td>90%</td>
<td>97%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>2.2.5</td>
<td>Combined with 2.2.4</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>2.2.6</td>
<td>Increase Project Volume by 10 proj/year</td>
<td>200 = bchmk; goal 210</td>
<td>22.6%</td>
<td>Annual</td>
<td>Annual</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3.4.1</td>
<td>90% Cap Construction Projects on Schedule</td>
<td>90%</td>
<td>0%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enhance customer satisfaction</td>
<td>4.1.1</td>
<td>Improve: Overall satisfaction rating</td>
<td>85%</td>
<td>89.0%</td>
<td>Annual</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>4.1.2</td>
<td>All FM Units Achieve Customer Satisfaction of 85%</td>
<td>85%</td>
<td>85.0%</td>
<td>Annual</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>4.1.3</td>
<td>Reduce: Maintenance &amp; Ops # hot/cold calls</td>
<td>-15% or &lt;133</td>
<td>202</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>4.1.4</td>
<td>Improve: Informal Projects rating (sat./very sat.)</td>
<td>90%</td>
<td>90.9%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>4.1.5</td>
<td>Improve: Capital Projects rating (sat./very sat.) - design</td>
<td>85%</td>
<td>100.0%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>4.1.6</td>
<td>Improve: Capital Projects rating (sat./very sat.) - constr</td>
<td>85%</td>
<td>no data</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>NEW</strong></td>
<td>All measures positive on customer sat survey</td>
<td>&lt;2% S Dis; &lt; 5% Dis or Neu</td>
<td>multiple</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Balance Score Card
FINANCIAL Perspective

Strategic Objectives:
- Manage Budget, Maximize Revenue Stream
- Promote Fiscal Responsibility
- Sustainable Practices
- Conserve Natural Resources
- Improve Employee Safety
- Improve HUB Participation
Facilities Management Strategic Planning Session - 2\textsuperscript{nd} Quarter FY 2011

GOAL #6 - Promote Good Stewardship

Strategy 6.1  Promote Fiscal Responsibility

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

Measure: Main Operating Fund Variance Report

Balanced Scorecard Category: Financial Perspective

---

### FACILITIES MANAGEMENT OPERATIONS thru December 31, 2010

<table>
<thead>
<tr>
<th>ACCOUNT DESCRIPTION</th>
<th>2010-11 Budget</th>
<th>% of TOTAL BUDGET</th>
<th>YTD ACTIVITY</th>
<th>ENCUMBRANCES</th>
<th>TOTAL EXPENDITURES</th>
<th>REMAINING BALANCE</th>
<th>VARIANCE (budgeted-actual)</th>
<th>_STATUS</th>
</tr>
</thead>
<tbody>
<tr>
<td>STUDENT AND TEMPORARY WAGES</td>
<td>$ 90,000</td>
<td>3%</td>
<td>$ 15,669</td>
<td>-</td>
<td>$ 15,669</td>
<td>$ 74,331</td>
<td>$ 74,331</td>
<td></td>
</tr>
<tr>
<td>PERSONAL SERVICE CONTRACTS</td>
<td>$ 109,650</td>
<td>3%</td>
<td>$ 56,427</td>
<td>$ 45,796</td>
<td>$ 102,223</td>
<td>$ 7,427</td>
<td>$ 7,427</td>
<td></td>
</tr>
<tr>
<td>CORPORATE SERVICES CONTRACTS (S&amp; A)</td>
<td>$ 860,115</td>
<td>26%</td>
<td>$ 344,524</td>
<td>$ 185,956</td>
<td>$ 530,479</td>
<td>$ 329,636</td>
<td>$ 329,636</td>
<td></td>
</tr>
<tr>
<td>OTHER ADMINISTRATIVE EXPENSES</td>
<td>$ 51,500</td>
<td>2%</td>
<td>$ 27,609</td>
<td>$ 19,592</td>
<td>$ 47,201</td>
<td>$ 4,299</td>
<td>$ 4,299</td>
<td></td>
</tr>
<tr>
<td>DOMESTIC TRAVEL/TRAINING</td>
<td>$ 67,500</td>
<td>2%</td>
<td>$ 39,803</td>
<td>$ 300</td>
<td>$ 40,103</td>
<td>$ 27,397</td>
<td>$ 27,397</td>
<td></td>
</tr>
<tr>
<td>FIXED PURCHASED SERVICES (Maint Agr)</td>
<td>$ 277,020</td>
<td>8%</td>
<td>$ 137,583</td>
<td>$ 72,754</td>
<td>$ 210,337</td>
<td>$ 66,683</td>
<td>$ 66,683</td>
<td></td>
</tr>
<tr>
<td>OTHER PURCHASED SERVICES</td>
<td>$ 466,100</td>
<td>14%</td>
<td>$ 165,210</td>
<td>$ 218,354</td>
<td>$ 383,564</td>
<td>$ 82,536</td>
<td>$ 82,536</td>
<td></td>
</tr>
<tr>
<td>SUPPLIES</td>
<td>$ 1,102,001</td>
<td>34%</td>
<td>$ 619,298</td>
<td>$ 128,818</td>
<td>$ 748,116</td>
<td>$ 353,885</td>
<td>$ 353,885</td>
<td></td>
</tr>
<tr>
<td>EQUIPMENT</td>
<td>$ 146,827</td>
<td>4%</td>
<td>$ 5,029</td>
<td>-</td>
<td>$ 5,029</td>
<td>$ 141,798</td>
<td>$ 141,798</td>
<td></td>
</tr>
<tr>
<td>CAPITAL OUTLAY</td>
<td>$ 26,750</td>
<td>1%</td>
<td>$ 457</td>
<td>$ 22,485</td>
<td>$ 22,941</td>
<td>$ 3,809</td>
<td>$ 3,809</td>
<td></td>
</tr>
<tr>
<td>FIXED CHARGES</td>
<td>$ 32,200</td>
<td>1%</td>
<td>$ 21,216</td>
<td>-</td>
<td>$ 21,216</td>
<td>$ 10,984</td>
<td>$ 10,984</td>
<td></td>
</tr>
<tr>
<td>RECYCLING</td>
<td>$ 37,515</td>
<td>1%</td>
<td>$ 16,668</td>
<td>$ 200</td>
<td>$ 16,868</td>
<td>$ 20,647</td>
<td>$ 20,647</td>
<td></td>
</tr>
<tr>
<td>FACILITIES MANAGEMENT Main Operating Funds</td>
<td>3,267,178</td>
<td>1,449,493.64</td>
<td>694,253.78</td>
<td>2,143,747.42</td>
<td>1,123,430.23</td>
<td>$ 1,123,430</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

STATUS
GOAL #6 – Promote Good Stewardship

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

ACTION PLAN

• **Actions Complete**
  - Periodically review expenditure reports as part of continuous improvement effort;

• **Actions Planned**
  - As part of Leadership Development Training Program, create training course - FM Budgeting 101 - which will focus on budget management skills. Anticipated development completion date has been pushed back to early 2011 due to e-procurement;
Facilities Management Strategic Planning Session - 2nd Quarter FY 2011

GOAL #6 - Promote Good Stewardship

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

**Measure:** Total dollar amount of grants and supplemental funding

**Balanced Scorecard Category:** Financial Perspective

---

### Grants and Supplemental Funding

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Amount ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>$4,000</td>
</tr>
<tr>
<td>2009</td>
<td>$0</td>
</tr>
<tr>
<td>2010</td>
<td>$0</td>
</tr>
</tbody>
</table>

Awards

Grants

---

**STATUS**
GOAL #6 - Promote Good Stewardship

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

ACTION PLAN

• Actions Complete
  ✓ Determined best deposit venue for monies received. Dilemma: how to minimize GF restrictions on award monies received; Worked with Sponsored Programs, Budget Office and Development to determine viable, legal solution

• Actions Planned
  1. Encourage individuals to participate in proposal development; Suggest that brief paragraphs on conceptual ideas for grants be developed for future use by Grants Management Specialist.
  2. Boast effort to locate external funding opportunities that align with FM’s strategic vision, mission and goals.
  3. Provide assistance in developing a strong proposal response to external funding collaboration within FM.
Facilities Management Strategic Planning Session - Second Quarter FY 2011

GOAL #6 - Promote Good Stewardship

Strategy 6.1 Promote Fiscal Responsibility
Objective 6.1.7 Exceed Labor Services Payroll requirements by 10%

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

Goal: $400,000.00/Qtr

Balanced Scorecard Category: Financial Perspective

Quarterly Reimbursable Labor $
GOAL #6 – Promote Good Stewardship

Strategy 6.1 Promote Fiscal Responsibility
Objective 6.1.7 Exceed Labor Services Payroll Requirements by 10%

ACTION PLAN

• Actions Complete
  1 – Utilized in-house staffing from other areas of Facilities Operations on projects rather than going to outside resources.
  2- Added reimbursable positions for Grounds in order to accomplish more billable work.

• Actions Planned
  1 – Continue to look for opportunities to expand reimbursable PM work to level peaks and valleys.
  2 – Continue to look within our Facilities Operations Labor pool before going outside for additional staff support.
Facilities Management Strategic Planning Session - Second Quarter FY 2011

GOAL #6 - Promote Good Stewardship

**Strategy** 6.2  Develop a Sustainable Campus

**Objective** 6.2.1  Increase Recycling of Construction and Demolition Materials on Renovations to 50% of Total C&D Waste

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

**Balanced Scorecard Category:** Financial Perspective

### Informal Projects - Materials Disposed

2nd Qtr FY11

- **GOAL (35% through 2nd Qtr 10; 50% for 3rd Qtr 10)**

- **Landfilled**
- **Recycled**
GOAL #6 – Promote Good Stewardship

Strategy 6.2  Develop a Sustainable Campus
Objective 6.2.1  Increase Recycling of Construction and Demolition Materials on Informal Projects and Renovations to 50% of Total C&D Waste

ACTION PLAN

• Actions Complete

• Actions Planned
  – Closer monitoring on design projects to ensure weight tickets received from contractors.
  – Pursue partnerships that allow for alternative disposal methods.
GOAL #6 - Promote Good Stewardship

Strategy 6.2  Develop a Sustainable Campus
Objective 6.2.2  Increase Recycling of Construction and Demolition Materials on Capital Projects to 50% of Total C&D Waste

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

Balanced Scorecard Category: Financial Perspective

Weights to varied to graph effectively. Recycling rate is 85%+ on all Capital projects.
GOAL #6 - Promote Good Stewardship

Strategy 6.2 Develop a Sustainable Campus
Objective 6.2.2 Increase Recycling of Construction and Demolition Materials on Capital/Formal Projects to 50% of Total C&D Waste

ACTION PLAN

• Actions Complete
  – All rates are 85%+ for Capital projects.

• Actions Planned
  – Continue monitoring projects and acting as resource for contractors.
Facilities Management Strategic Planning Session - 2nd Quarter FY 2011

GOAL #6 - Promote Good Stewardship

Strategy 6.2  Develop a Sustainable Campus
Objective 6.2.3  Increase Percent of Solid Waste Recycled on Campus by 5%

Measure: Pounds of solid waste recycled annually divided by total solid waste

Balanced Scorecard Category: Financial Perspective

Breakdown of Solid Waste

<table>
<thead>
<tr>
<th></th>
<th>Total Solid Waste</th>
<th>Total Waste Diverted</th>
</tr>
</thead>
<tbody>
<tr>
<td>4th Qtr FY08</td>
<td>695 tons</td>
<td>198 tons</td>
</tr>
<tr>
<td>1st Qtr FY08</td>
<td>718 tons</td>
<td>244 tons</td>
</tr>
<tr>
<td>2nd Qtr FY09</td>
<td>594 tons</td>
<td>162 tons</td>
</tr>
<tr>
<td>3rd Qtr FY09</td>
<td>753 tons</td>
<td>194 tons</td>
</tr>
<tr>
<td>4th Qtr FY09</td>
<td>608 tons</td>
<td>193 tons</td>
</tr>
<tr>
<td>1st Qtr FY10</td>
<td>620 tons</td>
<td>196 tons</td>
</tr>
<tr>
<td>2nd Qtr FY10</td>
<td>698 tons</td>
<td>214 tons</td>
</tr>
<tr>
<td>3rd Qtr FY10</td>
<td>732 tons</td>
<td>242 tons</td>
</tr>
<tr>
<td>4th Qtr FY10</td>
<td>790 tons</td>
<td>236 tons</td>
</tr>
<tr>
<td>1st Qtr FY11</td>
<td>632 tons</td>
<td>211 tons</td>
</tr>
<tr>
<td>2nd Qtr FY11</td>
<td>694 tons</td>
<td>246 tons</td>
</tr>
</tbody>
</table>

Breakdown of Solid Waste
GOAL #6 - Promote Good Stewardship

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

ACTION PLAN

• Actions Complete - TOTAL recycling for quarter 35%
  – Continue to provide timely and efficient collection service of recyclable and reusable items to the entire campus and outreach efforts to University community
    • Completed inventory of all indoor recycling bins on campus
    • Working on inventory all outdoor recycling bins
    • Continue to chair Carolina Recycling Coalition’s Collegiate Recycling Council.
    • Assist Sustainability Coordinator with Zero Waste Goal and American College & University Climate Commitment
  – Partnered with Housekeeping –pilot office trash can reduction program at GRIGG in October
  – working on designs for a comprehensive composting program, food audit conducted in October

• 2nd Quarter Actions Planned
  – Continue to provide timely and efficient collection service of recyclable and reusable items to the entire campus
    • Continue to research markets and collection options for more efficient recycling, especially paper
    • barcode all indoor recycling bins this quarter
    • inventory all outdoor recycling bins
  – Continue educational outreach and promotion
    • eARTh Day poster contest
    • working with 2012 NCAPPA conference committee
      – Will present at 2012 NCAPPA conference March 2-3
    • present at 2012 CRA conference in March 30-31
  – Designing comprehensive food composting program
  – Designing Zero Waste Options for FOOTBALL
  – Need comprehensive resource management action for all staff at UNC Charlotte
GOAL #6 – Promote Good Stewardship

Strategy 6.2 Develop a Sustainable Campus

Objective 6.2.4 Implementation of sustainability plan actions

- Energy star procurement policy
- Energy reduction competitions
- Building performance metrics
- Start CAP
- Engage campus community in CAP
- Support campus bike initiatives
- CATS Campus Routes

- Establish waste minimization criteria in purchasing process
- WaterSense procurement
- EPP procedures
- LEED EB O&M procedures
- Promote campus wide green cleaning
- Discussion on reducing campus “lawns”

- Procure 20% local food by dollar
- Procure 20% organic by dollar value
- Establish annual sustainability competitions
- Track sustainability funded research dollars
- Campus dashboard development
- Promote student/faculty/facilities relationships

- Complete campus policies
- Reporting
- Funding

- Emissions Reduction
- Resource conservation
- Commitment
- Stewardship Enhancement
GOAL #6 – Promote Good Stewardship

Strategy 6.2 Develop a Sustainable Campus

Objective 6.2.4 Implement 50% of the phase 1 sustainability plan actions in each focus area by end of FY 2011

Measure: Number of actions completed in each category

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

Strategy 6.2 Develop a Sustainable Campus

Objective 6.2.4 Implementation of sustainability plan actions

**ACTION PLAN**

**Actions Completed**

- Sustainability Curriculum Progress
  - QEP meeting
  - Faculty Committee
    - Defining sustainability
- Completed GHG Inventory
- 1st GHG Workshop
- Campus Sustainability Policy Completed draft
- Sustainability Plan completed draft
- Levine Scholars involvement
GOAL #6 – Promote Good Stewardship

Strategy 6.2 Develop a Sustainable Campus

Objective 6.2.4 Implementation of sustainability plan actions

**ACTION PLAN**

- **Actions Planned**
  - Emissions reduction:
    - Campus GHG workshops
    - Climate Action Planning
      - Establish Planning Charette
      - Identify strategies
      - Establish goals
    - Emissions reduction competitions
  - Resource Conservation
    - Complete LEED EB O&M pilot
    - Identify current environmental procurement policies in different purchasing categories.
GOAL #6 – Promote Good Stewardship

Strategy 6.2 Develop a Sustainable Campus

Objective 6.2.4 Implementation of Sustainability plan actions

ACTION PLAN

Actions Planned

– Stewardship Enhancement
  • Develop campus dashboard
  • Track % of dollar spent on local/organic food
  • Track % of dollar spent on sustainability based research
  • Sustainability curriculum offerings inventory

– Commitment
  • Secure sustainability program funding
  • Hire sustainability intern
  • On campus sustainability marketing
  • Campus speakers
Facilities Management Strategic Planning Session - 2nd Quarter FY 2011

GOAL #6 - Promote Good Stewardship

Strategy 6.3  Conserve Natural Resources
Objective 6.3.1  Decrease Energy Usage by 30% by FY2015 (State Guideline)

Measure:  BTUs/GSF/Year consumed on campus

Balanced Scorecard Category:  Financial Perspective

CAMPUS ENERGY USAGE

BTU/GSF-DD

Goal and Actual are Based on FY10

NC State Mandate Session Law 2007-546.
(Base Year FY 2003)

20% Reduction by FY2010
30% Reduction by FY2015
GOAL #6 – Promote Good Stewardship

Strategy 6.3 Conserve Natural Resources
Objective 6.3.1 Decrease Energy Usage by 20% of FY2010

ACTION PLAN - ENERGY

• Actions Complete
  ▪ Performance contract progressing.
  ▪ Updated Design Manual MEP to reflect energy Best Practices.

• Actions Planned
  ▪ Hire New Energy Manager
  ▪ Complete Engineering and Zone coordination for energy operation.
  ▪ Finalize space temperature guidelines.
GOAL #6 – Promote Good Stewardship

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

ACTION PLAN - ESPC

Energy Savings Performance Contract

• Actions Complete
  - ESCO (Ameresco) completed 30% IGA. 60% IGA projected 1st of February.
  - 3rd Party consultant, Celtic Energy, provides support and evaluation of IGA.

• Actions Planned
  - Investment Grade Audit (IGA) 90% submit March 1, 2011
    - Finalize acceptable ECMs.
    - Energy Services Agreement (ESA) signed (August 2011)
Facilities Management Strategic Planning Session - Second Quarter FY 2011

GOAL #6 - Promote Good Stewardship

**Strategy** 6.5 Improve Historically Underutilized Business (HUB) Participation

**Objective** 6.5.1 12% HUB participation on 80% of Capital Projects

**Measure:** Percentage of Individual Capital Projects achieving 12% HUB participation

**Balanced Scorecard Category:** Financial Perspective

<table>
<thead>
<tr>
<th>Strategic Review</th>
<th>Total Projects</th>
<th>Projects with 12% HUB Participation</th>
<th>Percentage of Total Projects with 12% HUB Participation</th>
</tr>
</thead>
<tbody>
<tr>
<td>3rd Qtr FY10</td>
<td>0</td>
<td>0</td>
<td>0%</td>
</tr>
<tr>
<td>4th Qtr FY10</td>
<td>3</td>
<td>0</td>
<td>0%</td>
</tr>
<tr>
<td>1st Qtr FY11</td>
<td>3</td>
<td>1</td>
<td>33%</td>
</tr>
<tr>
<td>2nd Qtr FY11</td>
<td>4</td>
<td>3</td>
<td>75%</td>
</tr>
</tbody>
</table>

Harris Alumni Parking Lot – 22.51%
New Tennis Courts Phase 1 – 27.52%
Reese Envelope – 100%
Boiler Replacement–Scott/Holshouser – 0%

**Capital Projects - HUB Participation**

- **Total Projects Completed**
- **Projects with 12% HUB Participation**
GOAL #6 – Promote Good Stewardship

**Strategy** 6.5  
Improve Historically Underutilized Business (HUB) Participation

**Objective** 6.5.1  
12% HUB participation on 80% of Capital Projects

## ACTION PLAN

### Actions Planned

1. Conduct “Meet & Greet” for professional services – March 2011
2. Conduct Bonding workshop with Swimmer Insurance Agency
3. Continue –
   - Encourage GCs to exceed 10% HUB participation goal
   - Work with GC/CMs to identify HUB subcontractors/partners
   - Promote mentor-protégé/partnerships/joint venture relationships at 1st tier subcontractor level
   - Work with GCs/agencies/organizations to identify/provide training to promote HUB growth and development
   - Monitor Pay Applications/Good Faith Efforts
   - Provide project/event information to the public
   - Educate business community on the process
   - Community outreach efforts
GOAL #6 – Promote Good Stewardship

Strategy 6.5 Improve African American Participation on Capital Projects
 Objective 6.5.2 3% African American Participation on Capital Projects

Measure: Percentage of Capital Dollars awarded to African American Firms

Balanced Scorecard Category: Financial Perspective

<table>
<thead>
<tr>
<th>Strategic Review</th>
<th>Total Capital Project Dollars</th>
<th>Total Capital Project Dollars to African American Firms</th>
<th>Percentage of Capital Project Dollars to African American Firms</th>
</tr>
</thead>
<tbody>
<tr>
<td>3rd Qtr FY10</td>
<td>$0</td>
<td>0</td>
<td>0%</td>
</tr>
<tr>
<td>4th Qtr FY10</td>
<td>$1,081,641</td>
<td>0</td>
<td>0%</td>
</tr>
<tr>
<td>1st Qtr FY11</td>
<td>$3,190,214</td>
<td>$80,864</td>
<td>3%</td>
</tr>
<tr>
<td>2nd Qtr FY11</td>
<td>$2,677,018</td>
<td>$165,262</td>
<td>6%</td>
</tr>
</tbody>
</table>

Capital Projects - African American Participation

- Total Capital Project Dollars
- Total Capital Project Dollars to African American Firms
GOAL #6 – Promote Good Stewardship

Strategy 6.5 Improve African American Participation on Capital Projects
Objective 6.5.2 3% African American Participation on Capital Projects

ACTION PLAN

• Actions Planned
  ▪ Conduct Bonding workshop with Swimmer Insurance Agency
  
  Continue –
  ▪ Educate HUB firms on the process
  ▪ Encourage HUB firms to bid university projects
  ▪ Promote mentor-protégé/partnerships/joint venture relationships between minority/non-minority firms
  ▪ Work with GCs/agencies/organizations to identify/provide training to promote HUB growth and development
Facilities Management Strategic Planning Session - Second Quarter FY 2011

GOAL #6 - Promote Good Stewardship

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

Measure: Percentage of Informal Contract Dollars awarded to HUB Contractors

Balanced Scorecard Category: Financial Perspective

<table>
<thead>
<tr>
<th>Strategic Review</th>
<th>Total Contract Dollars Awarded</th>
<th>Total Contract Dollars Awarded to HUB Contractors</th>
<th>Dollars Awarded to HUB Contractors 13% GOAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>3rd Qtr FY10</td>
<td>$185,200</td>
<td>$0</td>
<td>0%</td>
</tr>
<tr>
<td>4th Qtr FY10</td>
<td>$1,657,110</td>
<td>$340,024</td>
<td>21%</td>
</tr>
<tr>
<td>1st Qtr FY11</td>
<td>$1,282,661</td>
<td>$176,569</td>
<td>14%</td>
</tr>
<tr>
<td>2nd Qtr FY11</td>
<td>No Data Available</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Informal Contract Dollars ($30K and above) Awarded to HUB Firms

- Total Contract Dollars Awarded
- Total Contract Dollars Awarded to HUB Contractors

- 3rd Qtr FY10: $185,200, 21%
- 4th Qtr FY10: $340,024, 21%
- 1st Qtr FY11: $176,569, 14%
- 2nd Qtr FY11: No Data Available
GOAL #6 - Promote Good Stewardship

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

ACTION PLAN

• Actions Complete
  ✓ Participated in prequalification of GCs, Electrical and Paving Contractors for Informal projects

• Actions Planned
  Continue –
  ▪ Encourage/Invite HUB firms to bid Informal Projects
  ▪ Assist Materials Management/Design Services identify HUB firms to bid projects
  ▪ Educate business community on the process
  ▪ Provide project/event information to the public
  ▪ Community outreach efforts
GOAL # 6 - Promote Good Stewardship

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

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

Balanced Scorecard Category: Financial Perspective

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

<table>
<thead>
<tr>
<th>QUARTERLY REVIEW</th>
<th>Value of Contracts under 30K</th>
<th>H.U.B. Contribution</th>
<th>HUB Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY '08</td>
<td>$ 2,861,776</td>
<td>$ 608,415</td>
<td>21.3%</td>
</tr>
<tr>
<td>FY '09</td>
<td>$ 1,404,456</td>
<td>$ 163,049</td>
<td>11.6%</td>
</tr>
<tr>
<td>FY '10</td>
<td>$ 2,626,647</td>
<td>$ 214,381</td>
<td>8.2%</td>
</tr>
<tr>
<td>QTR 1</td>
<td>$ 684,520</td>
<td>$ 122,224</td>
<td>17.9%</td>
</tr>
<tr>
<td>QTR 2</td>
<td>$ 1,400,523</td>
<td>$ 167,415</td>
<td>12.0%</td>
</tr>
<tr>
<td>QTR 3</td>
<td>$ -</td>
<td>$ -</td>
<td>0.0%</td>
</tr>
<tr>
<td>QTR 4</td>
<td>$ -</td>
<td>$ -</td>
<td>0.0%</td>
</tr>
<tr>
<td><strong>FY '11 STATUS</strong></td>
<td>$ 2,085,043</td>
<td>$ 289,639</td>
<td><strong>13.9%</strong></td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>QUARTERLY REVIEW</th>
<th>Value of Contracts under 30K</th>
<th>African Am. Contribution</th>
<th>African Am. Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY '08</td>
<td>$ 2,861,776</td>
<td>$ 530,550</td>
<td>18.5%</td>
</tr>
<tr>
<td>FY '09</td>
<td>$ 1,404,456</td>
<td>$ 75,961</td>
<td>5.4%</td>
</tr>
<tr>
<td>FY '10</td>
<td>$ 2,626,647</td>
<td>$ 113,196</td>
<td>4.3%</td>
</tr>
<tr>
<td>QTR 1</td>
<td>$ 684,520</td>
<td>$ 15,750</td>
<td><strong>2.3%</strong></td>
</tr>
<tr>
<td>QTR 2</td>
<td>$ 1,400,523</td>
<td>$ 625</td>
<td><strong>3%</strong></td>
</tr>
<tr>
<td>QTR 3</td>
<td>$ -</td>
<td>$ -</td>
<td>0.0%</td>
</tr>
<tr>
<td>QTR 4</td>
<td>$ -</td>
<td>$ -</td>
<td>0.0%</td>
</tr>
<tr>
<td><strong>FY '11 STATUS</strong></td>
<td>$ 2,085,043</td>
<td>$ 16,375</td>
<td><strong>0.8%</strong></td>
</tr>
</tbody>
</table>

NOTE: African American firms are targeted to meet or exceed a 3% participation goal and utilized for $15,750 or 2.3% of all informal contracts below $30,000.
**GOAL # 6 - Promote Good Stewardship**

**Strategy** 6.5  Improve Historically Underutilized Business Participation

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

**ACTION PLAN**

6.5.3 - Actions Completed:

☑️ N/A

6.5.4 - Actions Planned:

☐ Continue to work with FIS on reports for extracting project data from Archibus - on going.

☐ Reporting process by utilizing Project Number, PO Date and Contract Amount - on going.

☐ Continue refining HUB reporting information in regards to Strategic Planning information - on going.

☐ Stress usage of HUB firms with Project Coordinators - on going.
## Balance Score Card

### DISCUSSION

### FINANCIAL PERSPECTIVE

<table>
<thead>
<tr>
<th>Financial</th>
<th>To financially sustain our mission, what must we focus on?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage Budget</td>
<td>6.1.1 Balanced Budget @ End of Year</td>
</tr>
<tr>
<td>Maximize Revenue Streams</td>
<td>6.1.2 Increase Grants/Supplemental Funding</td>
</tr>
<tr>
<td>Promote fiscal responsibility</td>
<td>6.1.3 Admin Cost/SGF +/- 5% of APPA Avg for Peer Inst.</td>
</tr>
<tr>
<td></td>
<td>6.1.4 Custodial Cost/SGF +/- 5% of APPA Avg for Peer Inst</td>
</tr>
<tr>
<td></td>
<td>6.1.5 Maint Cost/SGF +/- 5% of APPA Avg for Peer Inst</td>
</tr>
<tr>
<td></td>
<td>6.1.6 Landscape Cost/SGF +/- 5% of APPA Avg for Peer Inst</td>
</tr>
<tr>
<td></td>
<td>6.1.7 Exceed Labor Services Payroll requirements by 10%</td>
</tr>
<tr>
<td></td>
<td>C&amp;D Recycling - Informal Projects</td>
</tr>
<tr>
<td></td>
<td>C&amp;D Recycling Capital Projects</td>
</tr>
<tr>
<td></td>
<td>Increase % Solid Waste Recycled (Baseline 2007)</td>
</tr>
<tr>
<td></td>
<td>Implement 50% of each 2008 Sustainability goals</td>
</tr>
<tr>
<td></td>
<td>Energy Usage by 2015</td>
</tr>
<tr>
<td>Improve HUB Participation</td>
<td>6.5.1 12% HUB participation on 80% of Capital Projects</td>
</tr>
<tr>
<td></td>
<td>6.5.2 3% African American Participation on Capital Projects</td>
</tr>
<tr>
<td></td>
<td>6.5.3 13% HUB participation on Informal Proj $30K and above</td>
</tr>
<tr>
<td></td>
<td>6.5.4 13% HUB for Informal Proj below $30,000 inc. 3% AA</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Annual FY 10</th>
<th>Annual FY 11</th>
</tr>
</thead>
<tbody>
<tr>
<td>$333,952</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Awaiting APPA 2010 Survey Results</td>
</tr>
<tr>
<td></td>
<td>Awaiting APPA 2010 Survey Results</td>
</tr>
<tr>
<td></td>
<td>Awaiting APPA 2010 Survey Results</td>
</tr>
<tr>
<td>$400,000/qtr</td>
<td></td>
</tr>
<tr>
<td>75%</td>
<td>75%</td>
</tr>
<tr>
<td>40%</td>
<td>40%</td>
</tr>
<tr>
<td>35%</td>
<td>35%</td>
</tr>
<tr>
<td>85%</td>
<td>85%</td>
</tr>
<tr>
<td>27%</td>
<td>27%</td>
</tr>
<tr>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>12%</td>
<td>12%</td>
</tr>
<tr>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>13%</td>
<td>13%</td>
</tr>
<tr>
<td>12%/0%</td>
<td>12%/0%</td>
</tr>
<tr>
<td>no data</td>
<td>no data</td>
</tr>
</tbody>
</table>
Balance Score Card

INTERNAL PROCESSES Perspective

Strategic Objectives:

- Labor Availability
- Logistics Efficiency
- Optimize Supply Chain
- Improve Process Reliability
- Manage Technical Resources
- Master/Project Planning Process
- Capital Project Administration
- Develop High-Quality Staff
"In business, words are words, explanations are explanations, promises are promises, but only performance is reality."

-- Harold Geneen, industrialist

**GOAL #1**

Improve Maintenance and Operation on the Campus
GOAL #1 - Improve maintenance and operations of the Campus

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

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

Balanced Scorecard Category: Internal Business Process
GOAL #1 – Improve Facilities Operations

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

ACTION PLAN

• Actions Complete
  1 – Continued improvement of accounting practices for time applied to WR’s. “Total Hours Recorded” increased this period from 73.47% of “Available Hours” last quarter to 91% of “Available Hours” this quarter.
  2 – Continued development of the PM program.

• Actions Planned
  1 – Continue to stress reporting and recording of employee’s time.
      a) Meet with shop supervisor and PA’s to review
      b) Stress importance with all employees.
Facilities Management Strategic Planning Session - Second Quarter FY 2011

GOAL #1 - Improve maintenance and operations of the Campus

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

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

Balanced Scorecard Category:  Internal Business Process
GOAL #1 - Improve Facilities Operations

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

ACTION PLAN

• Actions Complete
  1 – No actions taken. Restocking being controlled by SDI’s automated system.

• Actions Planned
  1 - Continue to let automated system control and see how it works.
  2 - Adding 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).
  3 - Late deliveries and spikes in usage were the main causes for inability to fill.
Facilities Management Strategic Planning Session - Second Quarter FY 2011

GOAL #1 - Improve maintenance and operations of the Campus

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

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

Goal: Less than 4 days

Balanced Scorecard Category: Internal Business Process

Receipt Time

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Request-to-Receipt Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Qtr FY11</td>
<td>6.31</td>
</tr>
<tr>
<td>2nd Qtr FY11</td>
<td>7.20</td>
</tr>
<tr>
<td>3rd Qtr FY11</td>
<td>0.00</td>
</tr>
<tr>
<td>4th Qtr FY11</td>
<td>0.00</td>
</tr>
<tr>
<td>Average FY11 (year-to-date)</td>
<td>6.76</td>
</tr>
</tbody>
</table>

Goal = 4 days

(1245 Requests)
GOAL #1 - Improve Facilities Operations

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

ACTION PLAN

• Actions Complete
  1 – Supervisors average approval time decreased from 11.28 hrs. in 1st Qtr to 10.6 hrs. in 2nd Qtr of this year.
  2 – Orders requiring more information rose to 2.4% of orders.
  3 – Monthly non-stock orders averaged 292 for all of FY09. Monthly non-stock orders averaged 366 for all of FY10, a 25% increase. First half FY11 averaged 345 a month; a 10% decrease over FY10’s average.

• Actions Planned
  1 – Non-stock items that have been ordered on a recurring basis are being added to stock inventory as ORO (Ordered On Request Only).
Facilities Management Strategic Planning Session - Second Quarter FY 2011

GOAL #1 - Improve maintenance and operations of the Campus

Strategy: 1.5 Improve Reliability
Objective: 1.5.1 Improve Completion of Preventative Maintenance Work Requests to over 90% from 87% last year.

Measure: Percentage of Preventive Maintenance Work Requests Completed vs. (Completed + Cancelled)

Balanced Scorecard Category: Internal Business Process

Preventive Maintenance

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Goal</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Qtr FY11</td>
<td>91.19%</td>
<td>0.00%</td>
</tr>
<tr>
<td>2nd Qtr FY11</td>
<td>90.00%</td>
<td>0.00%</td>
</tr>
<tr>
<td>3rd Qtr FY11</td>
<td>0.00%</td>
<td>0.00%</td>
</tr>
<tr>
<td>4th Qtr FY11</td>
<td>90.60%</td>
<td></td>
</tr>
<tr>
<td>Average FY11 (year-to-date)</td>
<td></td>
<td>82%</td>
</tr>
</tbody>
</table>
GOAL #1 - Improve Facilities Operations

Strategy: 1.5 Improve Reliability
Objective: 1.5.1 Improve Completion of Preventative Maintenance Work Requests to over 90%

ACTION PLAN

• Actions Complete
  1 – Hired PM Manager.

• Actions Planned
  1 – Continue development of PM Program.
  2 – Closer monitoring of PM completions by Supervisor and Managers.
Facilities Management Strategic Planning Session - Second Quarter FY 2011

GOAL #1 - Improve maintenance and operations of the Campus

Strategy: 1.5 Improve Reliability
Objective: 1.5.2 Decrease number of Unscheduled Equipment Replacement Projects by 15%

Measure: Number of Unscheduled Equipment Replacement Projects in Quarter

Goal: Less than 8 per year or 2 per quarter

Balanced Scorecard Category: Internal Business Process
GOAL #1 - Improve Facilities Operations

Strategy: 1.5  Improve Reliability
Objective: 1.5.2  Decrease number of Unscheduled Equipment Replacement Projects by 15%

ACTI ON PLAN

• Actions Complete
  1 – Continued adding equipment to PM program.
  2 – Initiated an “Out of Service” measure in Archibus.

• Actions Planned
  1 – Continue expansion of PM Program.
  2 – Continue expansion of predictive maintenance program.

Note: Major equipment replacement this period one VFD.
FM 5YP Prioritized Projects – FY11

2. Enterprise Data Assistant (EDA) Project (Recycling, FO-WR, HSKPG, FCAP, Asset Mgmt)
3. Archibus Web Central Space Audit
4. Customer Service Improvements (Communication) - HOLD
5. Archibus - Equipment and PM Management
6. Tridium Energy Management – Phase One: SOP, Inventory and Energy Reporting
7. Archibus Key Management – Phase One & Two
8. Infrastructure Drawings and Mapping – Phase One: Archibus/ESRI Extensions Overlay configuration and Safety Equipment identification
9. Primavera P6 & Contract Management Continuous Improvements
10. Archibus Document Management - Drawing and Document Archive
Facilities Management Strategic Planning Session – Second Quarter FY 2011

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

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

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

Measure: Completion of Five-Year Technology Milestones

Balanced Scorecard Category: Internal Processes

Current Project Percentage Completion Status

![Bar chart showing current project percentage completion status for various projects over different quarters (FY11Q1, FY11Q2, FY11Q3, FY11Q4).]
Facilities Management Strategic Planning Session - Second Quarter FY 2011

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

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

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

Measure:  Completion of Five-Year Technology Milestones

Task Completion Milestones Percentage (FY10 - FY15)

Balanced Scorecard Category: Internal Processes

Cumulative Project Average
Baseline Average

STATUS
GOAL #2 - Successfully Adapt Existing Facilities to Meet New Requirements

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

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

ACTION PLAN

Actions Completed:
1. Completed Space Audit open training sessions in November and finalize reports.
3. BAS/Tridium – David Champion started 11/1/2010 and has started BAS Inventory and SOP
4. Key Management - Close out Phase one Developments for finalizing signoff
5. Started first Customer Workgroups for Archibus Project Management
6. Enterprise Data Assistant (EDA) –
   1. Completed WF, SOP, and printed bin labels for Recycling Pilot.
   2. Completed WF and SOP FO Work Requests. (Shops have completed 65% Building barcode labels)
7. GIS and Drawings – Now available to all of campus FS under WR Customer role.

Actions Planned:
1. Space Audit – Work with AA and Art Planning to perform FM Space cleanup and to establish deadline to close out first space audit.
2. Enterprise Data Assistant (EDA) – Begin pilot for Recycling and FO pilot shops in February.
3. CRDM - Finalize process work flow and SOP
4. BAS/Tridium – Complete Inventory. Complete current bug list on all AX JACE panels. Begin monthly BAS meetings.
5. Primavera Contract Management – Have plan for next steps for improvement
GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

**Strategy 2.3:** Improve repair and renovation planning; prioritization process and Implementation

**Objective 2.3.1.** Identify priority R & R projects and coordinate estimates

Measure: % of approved annual R & R projects identified and estimated.

Lead: Architectural Planning Dept

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

**Objective 3.2.1**
80% of Projects on the Appropriated Six Year Capital Improvements Plan have completed pre-programs by January 2011

Measure: % of Projects with completed Pre-Programs

Lead: Architectural Planning Dept

**Objective 3.2.2**
80% of Projects on the Non-Appropriated Six Year Capital Improvements Plan have completed pre-programs and estimates by January 2011

Measure: % of projects with completed pre-programs with OC25s.

Lead: Architectural Planning Dept
GOAL #3 – Deliver New Facilities that Support the University’s Mission

Strategy 3.5: Improve Infrastructure improvement planning
Objective 3.5.1. Integrate infrastructure projects into Capital Construction Project Scopes

Measure: % of projects on the 6 year plan (appropriated and non-appropriated) with integrated Infrastructure projects included and estimated.
Lead: Architectural Planning Dept

New Strategy 3.6: Improve and Manage Campus Design Guidelines, Standards and Specifications
Objective 3.6.1. Integrate Master Plan Design Guidelines into a useable on-line document and conduct periodic review and updates.

Measure: New Design guidelines posted and annual review with updates conducted; % of sections updated and posted.
Lead: “Architectural Planning Dept”
Facilities Management Strategic Planning Session - Second Quarter FY 2011

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

Strategy 3.2 Improve the Six Year Plan for Appropriated Capital Improvements

Objective 3.2.1 80% of Projects on the Appropriated Six Year Capital Improvements Plan have completed pre-programs and OC25s for hand-off to Capital by the end of 2nd quarter FY 2011

Measure: % of Projects completed for transfer to Capital Dept.

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

Strategy 3.2 Improve the Six Year Plan for Appropriated Capital Improvements

Objective 3.2.1 80% of Projects on the Appropriated Six Year Capital Improvements Plan have completed pre-programs by end of 2nd quarter FY 2011

Appropriated Projects

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

* Pending AA review, changes, and approval

** ACTION PLAN **

• Actions Complete
  Appropriated List submitted

  Actions Planned: Validating Programs
  ○ Science Building: Pending meeting with AA
  ○ Burson: Pending meeting with AA
  ○ Student Academic Success and Retention Center: Pending meeting with AA
  ○ Atkins Library: Pending meeting with new University Librarian

  Actions Planned: Pre-programming
  ○ Continue to work down the list
  ○ We are told by Jay Raja that we can begin preprogramming in earnest this Fall.
Facilities Management Strategic Planning Session - Second Quarter FY 2011

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

**Strategy**  3.3  
**Objective**  3.3.1  
**Measure:**  

**Balanced Scorecard Category:** Internal Business Process

<table>
<thead>
<tr>
<th>STRATEGIC REVIEW by Fiscal Year (July-June)</th>
<th>No. of projects authorized in Capstat</th>
<th>Designer under contract within 120 days</th>
<th>Designer not under contract within 120 days</th>
<th>% Designers under contract w/in</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summary FY-09</td>
<td>9</td>
<td>3</td>
<td>4</td>
<td>33.30%</td>
</tr>
<tr>
<td>Summary FY-10</td>
<td>10</td>
<td>9</td>
<td>3</td>
<td>75.0%</td>
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<tr>
<td>1st Qtr. FY-11</td>
<td>5</td>
<td>0</td>
<td>2</td>
<td>40.0%</td>
</tr>
<tr>
<td>2nd Qtr. FY-11</td>
<td>4</td>
<td>1</td>
<td>0</td>
<td>100.0%</td>
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<tr>
<td>3rd Qtr. FY-11</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4th Qtr. FY-11</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Objective for 2nd Quarter is 100%
Year to date is 70%
GOAL #3 – Deliver New Facilities that Support the University’s Mission

Strategy 3.3 Improve the Capital Design Process
Objective 3.3.1 90% of Designers under contract within 120 days of Project posting in CAPSTAT

ACTION PLAN

• Actions Completed
  – 1. Residence Hall Phase XI posted in CAPSTAT (Oct.)
  – 2. Student Housing Demolition posted in CAPSTAT (Dec.)
  – 3. Residence Hall Phase X design fee negotiated

• Actions Planned
  – 1. Negotiate and execute contracts for Phase XI
  – 2. Advertise for Parking Deck J and demo Student Housing
  – 3. Select designer for RDH and initiate advance planning
GOAL #3 - Deliver New Facilities that Support the University’s Mission

Objective 3.3.2 90% of Designs complete by the scheduled completion time

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

Balanced Scorecard Category: Internal Business Process

<table>
<thead>
<tr>
<th>STRATEGIC REVIEW by Fiscal Year (July-June)</th>
<th>No. of projects completed by scheduled time</th>
<th># not completed by scheduled time</th>
<th>% Designs complete by completion time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summary FY-09</td>
<td>4</td>
<td>0</td>
<td>100.00%</td>
</tr>
<tr>
<td>Summary FY-10</td>
<td>9</td>
<td>5</td>
<td>63.00%</td>
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<tr>
<td>1st Qtr. FY-11</td>
<td>2</td>
<td>0</td>
<td>100.00%</td>
</tr>
<tr>
<td>2nd Qtr. FY-11</td>
<td>1</td>
<td>0</td>
<td>100.00%</td>
</tr>
<tr>
<td>3rd Qtr. FY-11</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>4th Qtr. FY-11</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
</tbody>
</table>

Objective for 2nd Quarter is 100%
Year to date is 100%
GOAL #3 – Deliver New Facilities that Support the University’s Mission

Strategy 3.3  Improve the Capital Design Process
Objective 3.3.2  90% of Designs complete by the scheduled completion date

ACTION PLAN

• Actions Completed
  – 1. Parking Deck I cd’s completed and approved by SCO

• Actions Planned
  – 1. Final PORTAL cd’s
  – 2. Complete advance planning for Residence Hall X & XI
  – 3. Complete advance planning for RDH
Facilities Management Strategic Planning Session - Second Quarter FY 2011

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

**Strategy** 3.3  Improve the Capital Design Process  
**Objective** 3.3.3  90% of Designs complete within design budgeted fee

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

**Balanced Scorecard Category:** Financial Perspective

<table>
<thead>
<tr>
<th>Projects</th>
<th>OC25</th>
<th>Initial Contract</th>
<th>Final/Current Contract</th>
<th>Percent Difference Between OC25 &amp; Initial &amp; Final</th>
<th>Completed Within Design Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Football/Sports</td>
<td>$3,950,000</td>
<td>$2,739,800</td>
<td>$3,224,472</td>
<td>-30.6%</td>
<td>0</td>
</tr>
<tr>
<td>Motorsports II</td>
<td>$399,000</td>
<td>$303,000</td>
<td>$303,700</td>
<td>-24.1%</td>
<td>0</td>
</tr>
<tr>
<td>Parking Deck I</td>
<td>$1,701,000</td>
<td>$1,044,000</td>
<td>$802,869</td>
<td>-38.6%</td>
<td>1</td>
</tr>
<tr>
<td>Parking Deck J</td>
<td>$2,211,057</td>
<td>$0</td>
<td>$0</td>
<td>0.0%</td>
<td>0</td>
</tr>
<tr>
<td>RDH Renovation</td>
<td>$1,742,048</td>
<td>$0</td>
<td>$0</td>
<td>0.0%</td>
<td>0</td>
</tr>
<tr>
<td>Res. Hall Ph. X</td>
<td>$2,809,632</td>
<td>$0</td>
<td>$0</td>
<td>0.0%</td>
<td>0</td>
</tr>
<tr>
<td>Res. Hall Ph. XI</td>
<td>$3,695,657</td>
<td>$0</td>
<td>$0</td>
<td>0.0%</td>
<td>0</td>
</tr>
<tr>
<td>Res. Hall Moore &amp; Sanford</td>
<td>$503,000</td>
<td>$435,000</td>
<td>$435,000</td>
<td>-13.5%</td>
<td>1</td>
</tr>
<tr>
<td>Tennis Courts</td>
<td>$292,972</td>
<td>$275,000</td>
<td>$275,000</td>
<td>-6.1%</td>
<td>1</td>
</tr>
</tbody>
</table>

*Factors in budget fee changes: Owner changes scope, owner adds more scope, ADA compliances.

Objective is 30%
GOAL #3 – Deliver New Facilities that Support the University’s Mission

<table>
<thead>
<tr>
<th>Strategy</th>
<th>Improve the Capital Design Process</th>
</tr>
</thead>
<tbody>
<tr>
<td>Objective</td>
<td>3.3.3 90% of Designs complete within design budgeted fee</td>
</tr>
</tbody>
</table>

**ACTION PLAN**

- **Actions Completed**
  - 1. Complete design of Tennis (Ph. II)

- **Actions Planned**
  - 1. Monitor designs of Residence Hall, RDH, Heck Dam
Facilities Management Strategic Planning Session - Second Quarter FY 2011

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

Strategy 3.4 Improve Administration of the Capital Construction Process
Objective 3.4.2 95% of Capital Projects completed within the original construction contract amount or Guaranteed Maximum Price (GMP) plus 3% new construction 5% renovation (contingency)

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

Balanced Scorecard Category: Internal Business Process

Projects listed are not complete

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

Strategy 3.4 Improve Administration of the Capital Construction Process
Objective 3.4.2 95% of Capital Projects completed within the original construction contract amount or Guaranteed Maximum Price (GMP) plus 3% (contingency)

ACTION PLAN

• Actions Completed
  – 1. N/A

• Actions Planned
  – 1. Close-out Tennis Phase I
  – 2. Close-out Bioinformatics
Facilities Management Strategic Planning Session - 2nd Quarter FY 2011

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

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

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

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

**Balanced Scorecard Category:**  Internal Processes

**Average Number of Days to Fill Nonexempt (Hourly) Vacancies**

<table>
<thead>
<tr>
<th>Quarter</th>
<th># of Non-Exempt Hires</th>
<th>Average number of Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q1</td>
<td>12</td>
<td>168</td>
</tr>
<tr>
<td>Q2</td>
<td>4</td>
<td>88</td>
</tr>
</tbody>
</table>

Goal: 80 days

**STATUS**
Facilities Management Strategic Planning Session – 2nd Quarter FY 2011

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

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

Measure: Days needed to fill vacant position

Balanced Scorecard Category: Internal Processes

Average Number of Days to Fill Exempt (Salaried) Vacancies

Goal: 120 days
GOAL #5 – Develop a valued, well-trained, motivated and diverse workforce

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

**Objective** 5.1.1  Benchmark vacancy time of no longer than 80 calendar days – Nonexempt

Benchmark vacancy time of no longer than 120 calendar days - Exempt

---

**ACTION PLAN**

- **Actions Complete**
  - ✓ New hiring process developed
  - ✓ Developed new process documentation
  - ✓ Met with University HR to review changes to People Admin system as it applies to new process
  - ✓ New Hiring Process review by FM Leadership team
  - ✓ Purchased new HRIS for FM HR
  - ✓ Redefine process measured (active recruitment)
  - ✓ Implement revamped Hiring Process in FY 2010

- **Actions Planned**
  1. Continue aggressive implementation of new hire process
  2. Develop process reinforcement communication for managers and supervisors
  3. Implementation of new HRIS for FM HR
     a. Input data
     b. Report development
## Balance Score Card

### DISCUSSION

### INTERNAL PROCESSES PERSPECTIVE

| Internal Processes                                                                 | 1.1.1 Increase Wrench Time | 1.2.1 Stock Fill Rate | 1.2.2 Non-stock cycle time (request to receipt time) | 1.5.1 On-time Prev. Maintenance completion | 1.5.2 Reduce Unscheduled equipment repl projects | 1.5.3 On-time Prev. Maintenance completion | 3.2.1 Projects on the Appropriated Six Year Plan have completed pre-programs | 3.2.2 Projects on the Non-appropriated Six Year Plan have completed pre-programs | 3.5.1 Integrate Infrastructure projects into Capital Construction Project scopes | 3.6.1 Integrate Design Guidelines into a useable on-line document and conduct periodic review and updates | 3.3.1 Designers under contract w/in 120 days of posting in CAPSTAT | 3.3.2 90% of designs complete by scheduled comp. date | 3.3.3 90% of designs w/in design budgeted fee | 3.4.2 95% of Cap Prof completed w/in orig contract or GMP | Develop high-quality staff | 5.1.1 Reduce Vacancy Time Calendar Days |
|-----------------------------------------------------------------------------------|-----------------------------|-----------------------|----------------------------------------------------|---------------------------------------------|-----------------------------------------------|---------------------------------------------|--------------------------------------------------------------------------------|--------------------------------------------------------------------------------|--------------------------------------------------------------------------------|--------------------------------------------------------------------------------|--------------------------------------------------------------------------------|--------------------------------------------------------------------------------|--------------------------------------------------------------------------------|--------------------------------------------------------------------------------|--------------------------------------------------------------------------------|--------------------------------------------------------------------------------|--------------------------------------------------------------------------------|--------------------------------------------------------------------------------|--------------------------------------------------------------------------------|
| Labor Availability                                                                | >80%                        | >97%                  | <4 days                                            | >90%                                        | <2                                            | <1                                          | 80%                                                                              | 80%                                                                              | 80%                                                                              | 80%                                                                              | 80%                                                                              | 90%                                                                              | 90%                                                                              | 90%                                                                              | 95%                                                                              | 80%                                                                              | 80%                                                                              | 100%                                                                         |
| Logistics Efficiency                                                               |                             |                       |                                                    |                                             |                                                |                                              |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |
| Optimize Supply Chain                                                              |                             |                       |                                                    |                                             |                                                |                                              |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |
| Improve Process Reliability                                                        |                             |                       |                                                    |                                             |                                                |                                              |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |
| Manage Technical Resources                                                         |                             |                       |                                                    |                                             |                                                |                                              |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |
| Master/Project Planning Process                                                    |                             |                       |                                                    |                                             |                                                |                                              |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |
| To satisfy and delight our customers, which operational processes must we excel in?|                             |                       |                                                    |                                             |                                                |                                              |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |
| Capital Project Administration                                                     |                             |                       |                                                    |                                             |                                                |                                              |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |
| Develop high-quality staff                                                         |                             |                       |                                                    |                                             |                                                |                                              |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |                                                                                   |
Balance Score Card
Learning & Growth Perspective

Strategic Objectives:
- Develop high quality staff
- Retain high quality staff
- Develop positive culture
- Improve Employee Safety
Facilities Management Strategic Planning Session - 2nd Quarter FY 2011

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

Strategy 5.1 Recruit a talented and diverse workforce in a timely fashion
Objective 5.1.2 100% of positions filled through targeted selection process by FY 2010

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

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

Positions filled using Targeted Selection

<table>
<thead>
<tr>
<th>Quarter</th>
<th># of Hires</th>
<th># Number NonExempt Hired</th>
<th># Number Exempt Hired</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q1</td>
<td>16</td>
<td>11</td>
<td>2</td>
</tr>
<tr>
<td>Q2</td>
<td>5</td>
<td>4</td>
<td>0</td>
</tr>
</tbody>
</table>

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

Strategy 5.1 Recruit a talented and diverse workforce in a timely fashion
Objective 5.1.2 100% of positions filled through targeted selection process by FY 2010

Measure: Completion of hiring checklist by hiring manager (including onboarding)

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

ACTION PLAN

• Actions Complete
  ✓ Obtained FM reservations for University offered training program
  ✓ Certified to offer DDI Targeted selection training specific to FM
  ✓ 35 FM managers and supervisors have completed Targeted Selection Training (97%)
  ✓ Behavioral Targeted Selection Training for all FM managers and supervisors Feb and Apr 2010
  ✓ Implementation of full Targeted Selection process 02/28/10

• Actions Planned
  1. Communication to Managers and Supervisors – more guidance on process
  2. Develop Targeted Selection on-line training session
Facilities Management Strategic Planning Session - 2nd Quarter FY 2011

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

Strategy 5.2 Implement training system to enhance employee performance and provide career growth
Objective 5.2.1 Increase Supervisor/Manager Training to **40 Hours** per Year

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

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

**FY 11**

*Training Hours for Supervisors & Managers by Quarter*

Annual Target = 40 hrs ea
(43 X 40 hrs ea = 1,720 hrs)

**Fiscal 2011 Results:**
- Goal 1720 hrs
- Actual 477 hrs (28%)

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Training Hours by QTR</th>
<th>YTD Training Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q1</td>
<td>184.5 hrs</td>
<td></td>
</tr>
<tr>
<td>Q2</td>
<td>292.5 hrs</td>
<td>477 hrs</td>
</tr>
<tr>
<td>Q3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q4</td>
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Status
**GOAL #5 – Develop a valued, well-trained, motivated and diverse workforce**

<table>
<thead>
<tr>
<th>Strategy</th>
<th>5.2</th>
<th>Implement training system to enhance employee performance and provide career growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Objective</td>
<td>5.2.1</td>
<td>Increase Supervisor/Manager Training to 40 Hours of per year.</td>
</tr>
</tbody>
</table>

## ACTION PLAN

- **Actions Completed**
  - Leadership Development Matrix developed
  - Roll-out of Leadership Development Program
  - Phase 1: Relationships and 7 Habits
  - Develop Individualized Leadership Development matrices w/ work plans by 6/1/2009
  - MECC II training and coaching

- **Actions Planned**
  1. Continue matrix updates
  2. Reassess target
  3. Develop compliance training and mission specific training metrics
Facilities Management Strategic Planning Session - 2nd Quarter FY 2011

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

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

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

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

**FY 11**

*Training Hours by Quarter (non-management)*

**Annual Target - 20 hrs ea**

(323 employees x 20 hrs ea = **6,460** hrs total)

**Fiscal 2011 Results:**

**Goal**

6,460 hrs

**Actual**

1,612.75 hrs (25%)

**STATUS**
<table>
<thead>
<tr>
<th>Unit/Zone</th>
<th>YTD (2 qtrs)</th>
<th>Unit/Zone</th>
<th>YTD (2 qtrs)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Design Services</td>
<td>79%</td>
<td>Facilities Operations Admin</td>
<td>71%</td>
</tr>
<tr>
<td>Grounds</td>
<td>6%</td>
<td>Zone 4</td>
<td>37%</td>
</tr>
<tr>
<td>FIS</td>
<td>149%</td>
<td>Central Operations</td>
<td>39%</td>
</tr>
<tr>
<td>Steam Plant</td>
<td>0%</td>
<td>Auto</td>
<td>68%</td>
</tr>
<tr>
<td>Zone 7</td>
<td>0%</td>
<td>Recycling</td>
<td>87%</td>
</tr>
<tr>
<td>Capital Projects</td>
<td>79%</td>
<td>Planning/Architectural</td>
<td>149%</td>
</tr>
<tr>
<td>Housekeeping</td>
<td>28%</td>
<td>Planning /Real Estate</td>
<td>150%</td>
</tr>
<tr>
<td>Lock Shop</td>
<td>11%</td>
<td>Business Office</td>
<td>102%</td>
</tr>
<tr>
<td>Zone 5</td>
<td>18%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>High Voltage &amp; Fire Alarms</td>
<td>9%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Zone 1</td>
<td>21%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Zone 6</td>
<td>21%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Zone 2</td>
<td>12%</td>
<td></td>
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</tr>
</tbody>
</table>
GOAL #5 - Develop a valued, well-trained, motivated and diverse workforce

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

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

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

ACTION PLAN

• Actions Complete
  ✓ Task force commissioned to provide suggestions on improving training & promotion: 6/30/08
  ✓ Formulated annual compliance training schedule in conjunction with EH&S Dept.
  ✓ Assess current FM employee training tracking system
  ✓ ESL training pilot
  ✓ Purchase new HRIS for FM HR
  ✓ Posted communication link to EH&S training schedule

• Actions Planned
  1. Reassess targets
  2. Continue development of training matrix for trades positions
  3. PC skills training for infrequent users in preparation for Web Time entry
  4. Implementation of new HRIS for FM HR
Facilities Management Strategic Planning Session – 2nd Quarter FY 2011

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

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

Measure: Annual Employee Turn-over Rate

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

Turnover by Quarter

Quarter 1 Results:
Goal < 14%
Actual 1%

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

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

Measure: Annual Employee Turn-over Rate

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

ACTION PLAN

• Actions Complete
  ✓ Prioritized and implemented approved Taskforce recommendations
  ✓ Management Development Program outlined
  ✓ Introduced Communications Policy
  ✓ Revamp employee exit interview process – web-based

• Actions Planned
  1. Develop succession management program
GOAL #5 - Develop a valued, well-trained, motivated and diverse workforce

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

**ACTION PLAN**

- **Actions Complete**
  - ✓ Survey administration done electronically.
  - ✓ Survey administered November through December 2009.
  - ✓ Survey results tabulated by UI and presented to Directors on January 26th.

- **Actions Planned**
  1. Look for common themes within both customer and employee satisfaction surveys.
  2. Develop action plan to address survey issues
  3. Determine date for next survey
GOAL #6 - Promote Good Stewardship

Strategy 6.4  Improve Employee Safety
Objective 6.4.1  Reduce Accidents by 10 Percent Annually

Measure: Number of reportable accidents (Measured by Calendar Year)

Goal: Less than 23 per year

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

Reportable Accidents to Date

<table>
<thead>
<tr>
<th>Year</th>
<th>CY 2008 YTD</th>
<th>CY 2009 YTD</th>
<th>CY 2010 YTD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reportable Accidents</td>
<td>26</td>
<td>24</td>
<td>17</td>
</tr>
</tbody>
</table>

Goal < 22 per year
GOAL #6 - Promote Good Stewardship

Strategy 6.4  Improve Employee Safety
Objective 6.4.1  Reduce Accidents by 15 Percent Annually

ACTION PLAN

• Actions Complete
  1 – Continued to emphasize safety through safety meetings, safety training and safety audits.

• Actions Planned
  1 – Zone supervisors to continue safety training and audits to improve overall OSHA compliance.
# Balance Score Card

## DISCUSSION

### LEARNING & GROWTH PERSPECTIVE

<table>
<thead>
<tr>
<th>Perspective</th>
<th>Strategic Objective</th>
<th>Goal</th>
<th>Lag Measures/Lead Measures</th>
<th>Target</th>
<th>Actual</th>
<th>1st Quarter</th>
<th>2nd Quarter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Learning &amp; Growth</td>
<td>5.1.2</td>
<td>Targeted Selection/Recruitment Training</td>
<td></td>
<td>100%</td>
<td>80%</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>5.2.1</td>
<td>Supervisor (all levels of supervision) training hours</td>
<td>1720 hrs</td>
<td>477</td>
<td>Annual</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>5.2.2</td>
<td>Staff (non supervisory) training hours</td>
<td>6460 hrs</td>
<td>1612.75</td>
<td>Annual</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Retain high quality staff</td>
<td>5.3.1</td>
<td>Reduce annual turnover rate</td>
<td>&lt;14%</td>
<td>1.5%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Develop positive culture</td>
<td>5.3.2</td>
<td>Overall Annual Employee satisfaction (No survey in 2010)</td>
<td>85%</td>
<td>No data</td>
<td>Annual</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Improve Employee Safety</td>
<td>6.4.1</td>
<td>Reduce Accidents by 10% annually (CY) - goal 22 or less</td>
<td>&lt;22</td>
<td>17</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>