Strategic Planning Session
Third Quarter – Fiscal Year 2012
April 24, 2012

...Creating a Campus of Distinction
GOAL #1

Improve Maintenance and Operation on the Campus

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

-- Harold Geneen, industrialist
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
GOAL #3

Deliver New Facilities that Support the University’s Mission

"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 # 4

Perfect a Customer Focused Organization

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

- Theo Michelson, State Farm Insurance
GOAL #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
GOAL #6

Promote Good Stewardship

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

-- Brian Tracy, Speaker, Author, Consultant
Balance Score Card

CUSTOMER Perspective

Strategic Objectives:

Work Request Process, Housekeeping Processes, Improve Process Reliability, Increase On-Time Delivery, Informal Project Administration, Enhance Customer Satisfaction
GOAL #1 - Improve Facilities Operations

Strategy:  1.3  Improve Work Request Process
Objective:  1.3.1  Decrease Percentage of Reactive Work Requests to < 58%
  1.3.2  Decrease Work Request Cycle Time by 5%

ACTION PLAN

• Actions Planned
  1 – Continue to build PM program to cover all equipment.
  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.
  4 – Emphasize Facilities Operations OP-16 Timely and Accurate Handling/Processing of WRs.
  5 – Hire UPA to clean up FO “dirty laundry”
Facilities Management Strategic Planning Session - Third Quarter FY 2012

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)
Goal: Percentage to average < 58% for year.

Balanced Scorecard Category: Customer Service

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

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Qtr FY12</td>
<td>50.00%</td>
</tr>
<tr>
<td>2nd Qtr FY12</td>
<td>56.60%</td>
</tr>
<tr>
<td>3rd Qtr FY12</td>
<td>47.85%</td>
</tr>
<tr>
<td>Average (year-to-date)</td>
<td>51.48%</td>
</tr>
</tbody>
</table>

Goal < 58%
Facilities Management Strategic Planning Session - Third Quarter FY 2012

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 5%

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

Goal: Less than 719 quarterly average for the year

Balanced Scorecard Category: Internal Business Process

Archibus Report
In error
Working w/FIS
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
  – Established Program Development and Education Coordinator Position

• Actions Planned
  – Continue quarterly self audits
  – Hire Program Development and Education Coordinator
Facilities Management Strategic Planning Session – 3rd Quarter FY 2012

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

APPALevels

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY11-4th QTR</td>
<td>90%</td>
</tr>
<tr>
<td>FY12-1st QTR</td>
<td>94%</td>
</tr>
<tr>
<td>FY12-2nd QTR</td>
<td>94%</td>
</tr>
<tr>
<td>FY12-3rd QTR</td>
<td>91%</td>
</tr>
</tbody>
</table>

Percentage = 91%
Customer Satisfaction of those surveyed:

- FY11 4th QTR = 96%
- FY12 1st QTR = 100%
- FY12 2nd QTR = 100%
- FY12 3rd QTR = 100%
GOAL #1 - Improve Facilities Operations

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

ACTION PLAN

• Actions Planned
  1 – Complete development of PM Program. Focus on new buildings (CCB and EPIC)
  2 – Closer monitoring of PM completions by Supervisors and Managers.
  3 – Continue expansion of PM Program and predictive maintenance program. Work with key customers.
  4 – Prepare program for major equipment repairs and replacement.
  5 – Review system projects identified on the R&R list and prioritize. Indicate urgency and recommend future funding dates.
  6 – Continue working with Simplex to bring the new buildings online with the network.
Facilities Management Strategic Planning Session - Third Quarter FY 2012

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)

**Goal:** Less than .0069 for year.

**Balanced Scorecard Category:** Customer Perspective
Facilities Management Strategic Planning Session - Third Quarter FY 2012

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)

Goal: Less than 10%

Balanced Scorecard Category: Customer Perspective
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
Objective 2.2.2 85% of Estimates for in house construction within +/- 10% of Actual
Objective 2.2.4 90% of All Construction Projects Meet Scheduled Beneficial Occupancy Date
Objective 2.2.6 Increase Project Volume by 10 projects per year - Project Counts by Phase

ACTION PLAN FOR IMPROVEMENT

☐ "Wildly Important Goal" - Handout guiding Customers through Design Services' project processes and Archibus - To be completed within the next 90 days.

☐ Complete Classroom Capacity and egress information by developing individual building standards - This is an ongoing process driven by building and project needs.

IMPLEMENTED ACTION PLANS

☐ Project schedules from Scope & Budget phase through, Design, Construction and Closeout - This is an ongoing process.

☐ Continue to establish proven steps to beneficial occupancy via departmental meetings - This is an ongoing process.

☐ "Wildly Important Goal" - Customer involvement with project Punch List process - This is an ongoing process.
Facilities Management Strategic Planning Session - Third Quarter FY 2012

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 '09</td>
<td>86</td>
<td>82</td>
<td>4</td>
<td>95.3%</td>
</tr>
<tr>
<td>FY '10</td>
<td>121</td>
<td>119</td>
<td>2</td>
<td>98.3%</td>
</tr>
<tr>
<td>FY '11</td>
<td>202</td>
<td>201</td>
<td>1</td>
<td>99.5%</td>
</tr>
<tr>
<td>QTR 1</td>
<td>22</td>
<td>22</td>
<td>0</td>
<td>100.0%</td>
</tr>
<tr>
<td>QTR 2</td>
<td>37</td>
<td>36</td>
<td>1</td>
<td>97.3%</td>
</tr>
<tr>
<td>QTR 3</td>
<td>58</td>
<td>57</td>
<td>1</td>
<td>98.3%</td>
</tr>
<tr>
<td>QTR 4</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.0%</td>
</tr>
<tr>
<td>FY ‘12 STATUS</td>
<td>117</td>
<td>115</td>
<td>2</td>
<td>98.3%</td>
</tr>
</tbody>
</table>
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>FY ’09</th>
<th>FY ’10</th>
<th>FY ’11</th>
</tr>
</thead>
<tbody>
<tr>
<td>No. Of Projects Estimated</td>
<td>78</td>
<td>144</td>
<td>122</td>
</tr>
<tr>
<td>Projects Estimated within +/- 10%</td>
<td>65</td>
<td>124</td>
<td>115</td>
</tr>
<tr>
<td>Projects Not Estimated within +/- 10%</td>
<td>13</td>
<td>20</td>
<td>7</td>
</tr>
<tr>
<td>Estimates within +/- 10%</td>
<td>83.3%</td>
<td>86.1%</td>
<td>94.3%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>QTR</th>
<th>FY ’09</th>
<th>FY ’10</th>
<th>FY ’11</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>32</td>
<td>46</td>
<td>51</td>
</tr>
<tr>
<td>2</td>
<td>32</td>
<td>46</td>
<td>48</td>
</tr>
<tr>
<td>3</td>
<td>0</td>
<td>0</td>
<td>3</td>
</tr>
<tr>
<td>4</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>FY ’12 STATUS</td>
<td>129</td>
<td>126</td>
<td>3</td>
</tr>
</tbody>
</table>

85% of Estimates for All Construction within 10% - 2.2.2

GOAL 85.0%
STATUS 100.0%
Facilities Management Strategic Planning Session - Third Quarter FY 2012

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

**Strategy** 2.2  
**Objective** 2.2.4  
Improve Informal Project Design and Construction Process  
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

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**QUARTERLY REVIEW**

<table>
<thead>
<tr>
<th></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>
</tr>
</thead>
<tbody>
<tr>
<td>FY '09</td>
<td>79</td>
<td>68</td>
<td>11</td>
<td>86.1%</td>
</tr>
<tr>
<td>FY '10</td>
<td>144</td>
<td>136</td>
<td>8</td>
<td>94.4%</td>
</tr>
<tr>
<td>FY '11</td>
<td>120</td>
<td>118</td>
<td>2</td>
<td>98.3%</td>
</tr>
<tr>
<td>QTR 1</td>
<td>32</td>
<td>32</td>
<td>0</td>
<td>100.0%</td>
</tr>
<tr>
<td>QTR 2</td>
<td>46</td>
<td>46</td>
<td>0</td>
<td>100.0%</td>
</tr>
<tr>
<td><strong>QTR 3</strong></td>
<td><strong>51</strong></td>
<td><strong>47</strong></td>
<td><strong>4</strong></td>
<td><strong>92.2%</strong></td>
</tr>
<tr>
<td>QTR 4</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td><strong>0.0%</strong></td>
</tr>
<tr>
<td><strong>FY '12 STATUS</strong></td>
<td><strong>129</strong></td>
<td><strong>125</strong></td>
<td><strong>4</strong></td>
<td><strong>96.9%</strong></td>
</tr>
</tbody>
</table>
Facilities Management Strategic Planning Session - Third Quarter FY 2012

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

<table>
<thead>
<tr>
<th>Strategy</th>
<th>2.2</th>
<th>Improve Informal Project Design and Construction Process</th>
</tr>
</thead>
<tbody>
<tr>
<td>Objective</td>
<td>2.2.6</td>
<td>Increase Project Volume by 10 projects per year - Project Counts by Phase</td>
</tr>
</tbody>
</table>

Measure: The 2008 Benchmark is 200 projects.

Balanced Scorecard Category: Customer Perspective

<table>
<thead>
<tr>
<th></th>
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<th></th>
</tr>
</thead>
<tbody>
<tr>
<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>136</td>
<td>161</td>
<td>173</td>
<td>194</td>
<td>205</td>
<td>190</td>
<td>115</td>
<td>182</td>
<td>254</td>
<td>107</td>
<td></td>
</tr>
</tbody>
</table>

Projects completed through 3rd Quarter: 75 85 106 107
Projects completed through 3rd Quarter: $3,075,745 $4,824,290 $7,857,752

THIS IS A FISCAL YEAR GOAL - REVIEWED QUARTERLY

44.6%
GOAL #3 - Deliver New Facilities that Support the University's Mission

Strategy  3.4  Improve Administration of the Capital Construction Process
Objective  3.4.1  90% of Capital Construction Projects completed on Schedule

ACTION PLAN

• Actions Complete

• Actions Planned
  1. Keep schedules current & refer to them monthly
  2. Discuss schedule (baseline & current) with end users
Facilities Management Strategic Planning Session - Third Quarter FY 2012

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

Strategy 3.4 Improve Administration of the Capital Construction Process
Objective 3.4.1 90% of capital construction Projects completed on time

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

Balanced Scorecard Category: Customer Perspective

<table>
<thead>
<tr>
<th>STRATEGIC REVIEW by Fiscal Year (July-June)</th>
<th># completed on schedule</th>
<th># not completed on schedule</th>
<th>% completed on time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summary FY-09</td>
<td>4</td>
<td>2</td>
<td>50%</td>
</tr>
<tr>
<td>Summary FY-10</td>
<td>6</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>Summary FY-11</td>
<td>7</td>
<td>1</td>
<td>88%</td>
</tr>
<tr>
<td>1st Qtr. FY-12</td>
<td>4</td>
<td>2</td>
<td>67%</td>
</tr>
<tr>
<td>2nd Qtr. FY-12</td>
<td>1</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>3rd Qtr. FY-12</td>
<td>0</td>
<td>4</td>
<td>0%</td>
</tr>
<tr>
<td>4th Qtr. FY-12</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
</tbody>
</table>

3rd Qtr. Objective is 0%
Year to date is 67%
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%

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

- Website W.I.G. - Continue development of new web pages for Safety, Training, and Customer Information for both internal and external customers. Currently working with Public Relations department. Awaiting hire of Communications Officer position to continue development.

- Hire Communications Officer position (new). Recruitment plan using a hybrid of Vice Chancellor’s Model is under development. Committee membership identified; Posting has been submitted to HR; Anticipated closing date is May 4th.

- Review processes and procedures from the Business and HR side
  - Concerns continue to surface regarding the impact of new technology on processes/procedures. Examples are People Admin and 49er Mart.
  - Review (lean) Time Sheet Processing. Processes have been mapped. Project slowed due to new university initiative.

- Develop plan with UNC Charlotte Urban Institute to administer the FY 12 Customer Satisfaction Survey.
  - Review current questions on the survey and seek input from Directors to ensure the survey asks the right questions.
  - Submit survey questions to AVC for review and final approval in early April. Target administration date is April 16th.
  - Schedule briefing with Directors and FM at large to review survey results once survey is completed. Compare Customer Satisfaction results with specific Employee Satisfaction Survey questions to the Customer survey.
Facilities Management Strategic Planning Session - 3rd Quarter FY 2012

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

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**Overall Satisfaction with Facilities Management Services**

![Graph showing overall satisfaction from FY 2008 to FY 2010.](Image)

- **FY 2008:** 69%
- **FY 2009:** N/A
- **FY 2010:** 89%

Goal = 85%
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 (%)

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

Goal = 85%

2008 Rating (%)
2010 Rating (%)
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>4.1.3</td>
<td>Decrease the Number of Hot/Cold Calls by 15%</td>
</tr>
</tbody>
</table>

**ACTION PLAN**

- **Actions Planned**
  1. Stay abreast of ESCO contract and ensure comfort is not sacrificed for energy.
  2. Ensure that Zones are checking BAS and monitoring conditions.
  3. Develop controls section and cross train with Zones.
Facilities Management Strategic Planning Session - Third Quarter FY 2012

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 174 (Goal = 133)

Measure: Number of hot/cold calls submitted on work requests.

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 4.1.4 90% of Informal Project Customers Satisfied or Very Satisfied

ACTION PLAN FOR IMPROVEMENT

- **Currently Customers are reluctant to respond to the questionnaire due to its length and requested level of detail.**

- **Work with FIS to revise the questionnaire as currently sent to our Customers - We would like this to be accomplished within the next 90 days.**

- **The concept of the on-line questionnaire is good. We need to find a way to encourage much more Customer participation.**
Facilities Management Strategic Planning Session - Third Quarter FY 2012

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

<table>
<thead>
<tr>
<th>QUARTERLY SURVEY</th>
<th>Number of Projects Surveys</th>
<th>Very Satisfied 5</th>
<th>Satisfied 4+</th>
<th>Somewhat Satisfied 3+</th>
<th>Neutral 2+</th>
<th>Somewhat Dissatisfied 1+</th>
<th>Ununsatisfied 0+</th>
<th>Percent Satisfied</th>
</tr>
</thead>
<tbody>
<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</td>
<td>0.0%</td>
</tr>
<tr>
<td>FY '10</td>
<td>30</td>
<td>18</td>
<td>5</td>
<td>0</td>
<td>6</td>
<td>1</td>
<td>0</td>
<td>76.7%</td>
</tr>
<tr>
<td>FY '11</td>
<td>33</td>
<td>24</td>
<td>6</td>
<td>2</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>90.9%</td>
</tr>
<tr>
<td>QTR 1</td>
<td>1</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>100.0%</td>
</tr>
<tr>
<td>QTR 2</td>
<td>3</td>
<td>2</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>100.0%</td>
</tr>
<tr>
<td>QTR 3</td>
<td>4</td>
<td>4</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>100.0%</td>
</tr>
<tr>
<td>QTR 4</td>
<td>0</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 '12 STATUS</td>
<td>8</td>
<td>7</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>100.0%</td>
</tr>
</tbody>
</table>

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

GOAL 90.0% STATUS 100.0%
Facilities Management Strategic Planning Session - Third Quarter FY 2012

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>Summary FY-11</td>
<td>7</td>
<td>3</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>1st Qtr. FY-12</td>
<td>2</td>
<td>1</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>2nd Qtr. FY-12</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>No Data</td>
</tr>
<tr>
<td>3rd Qtr. FY-12</td>
<td>3</td>
<td>2</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>4th Qtr. FY-12</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>No Data</td>
</tr>
</tbody>
</table>

No data is a result of customer not answering questionnaire or questionnaire not being sent out for the quarter

Objective for 3rd Quarter is 100%
Year to date is 100%
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. Produced surveys for PORTAL, Residence Hall Phase X and Scott Hall Fire Suppression.

• Actions Planned
  – 1.
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>Summary FY-11</td>
<td>5</td>
<td>1</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>1st Qtr. FY-12</td>
<td>3</td>
<td>1</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>2nd Qtr. FY-12</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.0%</td>
</tr>
<tr>
<td>3rd Qtr. FY-12</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.0%</td>
</tr>
<tr>
<td>4th Qtr. FY-12</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.0%</td>
</tr>
</tbody>
</table>

% customers satisfied at end of construction

Objective for 3rd Quarter has no data
Year to date is 100%
GOAL #4 - Perfect a Customer Focused Organization

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

**ACTION PLAN**

- Actions Complete
  - 1. Produced surveys for Motorsports and Student Housing Demolition.

- Actions Planned
  - 1.
## 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>
<th>3rd Quarter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer</td>
<td>1.3.1</td>
<td>Reactive Maintenance work requests</td>
<td>&lt;58%</td>
<td>51.40%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>1.3.2</td>
<td>Decrease Work Request Cycle Time by 5%</td>
<td>&lt;300 hrs</td>
<td>n/a</td>
<td></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>91%</td>
<td></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;=0.0069</td>
<td>0.0004%</td>
<td></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>0.03%</td>
<td></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>98.3%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Informal Project Administration</td>
<td>2.2.2</td>
<td>85% of Estimates for All Construction within +/- 10%</td>
<td>85% w/in 10% actuals</td>
<td>94.1%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>2.2.3</td>
<td>Combined with 2.2.2</td>
<td>92.2%</td>
<td>92.2%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>2.2.4</td>
<td>Combined with 2.2.4</td>
<td>90%</td>
<td>90%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>2.2.5</td>
<td>Combined with 2.2.4</td>
<td>95%</td>
<td>95%</td>
<td></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>85%</td>
<td></td>
<td></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%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>4.1.3</td>
<td>Reduce: Maintenance &amp; Ops # hot/cold calls</td>
<td>-10% or &lt;133</td>
<td>160</td>
<td></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>100.0%</td>
<td></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%</td>
<td></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>100%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>4.1.7</td>
<td>All measures positive on customer sat survey</td>
<td>&lt;2% S Dss; &lt; 5% Is or Neu</td>
<td>n/a</td>
<td></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
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.

Objective 6.1.2 Increase Grants and Supplemental Funding to the Department by 25%

Objective 6.1.3 Lower Administrative Cost/GSF to +/-5% of the APPA Average for Peer Institutions

CONTINUOUS IMPROVEMENT ACTION PLAN

- Periodically review expenditure reports; Ensure that FM does not overspend its operating and supplemental budgets. While several individual funds met the goal, FM did not reach our target spend of 75% spent by end of the third quarter, March 2012 across the board.

- Continue to work through accounting issues such as use of account codes, receiving, after the fact vs. non-compliant requisitions, etc. Send reminders to responsible parties. Review cost accounting centers in preparation for future reporting requirements.

- Improve communication with the Controller’s Office, the Budget Office and FM (Capital, Design Services and Real Estate/Land Use). Meetings are underway to develop guidelines for Financial Statement reporting and Fixed Assets concerns. Additionally, meeting invitations were sent to external to FM units to provide Informal Project updates by fund type. Next meeting to be held on April 9th.

- Boast effort to locate external funding opportunities that align with FM’s strategic vision, mission and goals;
Facilities Management Strategic Planning Session - 3rd Quarter FY 2012

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

---

<table>
<thead>
<tr>
<th>ACCOUNT DESCRIPTION</th>
<th>2011-12 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>
</tr>
</thead>
<tbody>
<tr>
<td>OVERTIME AND PREMIUM PAY</td>
<td>$294,000</td>
<td>7%</td>
<td>$166,333</td>
<td>-</td>
<td>$166,333</td>
<td>$127,667</td>
<td>$127,667 F</td>
</tr>
<tr>
<td>STUDENT AND TEMPORARY WAGES</td>
<td>$39,000</td>
<td>1%</td>
<td>$16,038</td>
<td>2,000</td>
<td>$18,038</td>
<td>$20,963</td>
<td>$20,963 F</td>
</tr>
<tr>
<td>PERSONAL SERVICE CONTRACTS</td>
<td>$130,650</td>
<td>3%</td>
<td>$96,458</td>
<td>7,406</td>
<td>$103,864</td>
<td>$26,786</td>
<td>$26,786 F</td>
</tr>
<tr>
<td>CORPORATE SERVICES CONTRACTS (3yr Agr)</td>
<td>$901,490</td>
<td>24%</td>
<td>$900,983</td>
<td>151,055</td>
<td>$1,032,039</td>
<td>$149,457</td>
<td>$149,457 F</td>
</tr>
<tr>
<td>OTHER ADMINISTRATIVE EXPENSES</td>
<td>$101,500</td>
<td>3%</td>
<td>$15,901</td>
<td>16,940</td>
<td>$32,841</td>
<td>$68,660</td>
<td>$68,660 F</td>
</tr>
<tr>
<td>DOMESTIC TRAVEL/TRAINING</td>
<td>$97,000</td>
<td>2%</td>
<td>$61,349</td>
<td>-</td>
<td>$61,349</td>
<td>$36,251</td>
<td>$36,251 F</td>
</tr>
<tr>
<td>FIXED PURCHASED SERVICES (Maint Agr)</td>
<td>$344,820</td>
<td>9%</td>
<td>$237,853</td>
<td>49,375</td>
<td>$287,228</td>
<td>$57,592</td>
<td>$57,592 F</td>
</tr>
<tr>
<td>OTHER PURCHASED SERVICES</td>
<td>$370,200</td>
<td>9%</td>
<td>$159,006</td>
<td>124,720</td>
<td>$283,726</td>
<td>$86,474</td>
<td>$86,474 F</td>
</tr>
<tr>
<td>SUPPLIES</td>
<td>$1,262,088</td>
<td>32%</td>
<td>$940,053</td>
<td>$167,977</td>
<td>$1,108,029</td>
<td>$154,059</td>
<td>$154,059 F</td>
</tr>
<tr>
<td>EQUIPMENT/TIT</td>
<td>$286,675</td>
<td>7%</td>
<td>$144,404</td>
<td>130,668</td>
<td>$275,072</td>
<td>$11,603</td>
<td>$11,603 F</td>
</tr>
<tr>
<td>CAPITAL OUTLAY</td>
<td>$14,400</td>
<td>0%</td>
<td>$12,324</td>
<td>-</td>
<td>$12,324</td>
<td>$2,076</td>
<td>$2,076 F</td>
</tr>
<tr>
<td>FIXED CHARGES</td>
<td>$35,350</td>
<td>1%</td>
<td>$18,281</td>
<td>-</td>
<td>$18,281</td>
<td>$17,069</td>
<td>$17,069 F</td>
</tr>
<tr>
<td>RECYCLING</td>
<td>$37,515</td>
<td>1%</td>
<td>$30,337</td>
<td>$1,263</td>
<td>$31,600</td>
<td>$5,915</td>
<td>$5,915 F</td>
</tr>
</tbody>
</table>

**FACILITIES MANAGEMENT Main Operating Funds**

- 3,975,294
- 2,392,984.83
- 651,404.19
- 3,044,389.02
- 930,904.98

**LENGTH OF TIME**: 10 MONTHS

- % of Actual Expenditures: 83.33%
- Percentage of Actual Expenditures: 64.38%
- Percentage: Actuials + Pending Commitments: 80.77%

**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%

Measure: Total dollar amount of grants and supplemental funding

Balanced Scorecard Category: Financial Perspective
Facilities Management Strategic Planning Session - 3rd Quarter FY 2012

GOAL #6 - Promote Good Stewardship

Strategy 6.1 Promote Fiscal Responsibility
Objective 6.1.3 Lower Administrative Cost/GSF to +/-5% of the APPA Average for Peer Institutions

Measure: Administrative cost/GSF from annual APPA Facilities Performance Indicators Report (APPA Benchmark)

Balanced Scorecard Category: Financial Perspective

Total Administrative Cost/GSF

- UNC Charlotte: 0.72, 0.67
- ECU: 0.48, 0.49, 0.60
- UNC-G: 0.39, 0.25, 0.60
- UM-Bcnty: 0.28, 0.27, 0.41
- UTex-San A.: 0.26, 0.41, 0.56
- UNLV: 0.46, 0.47, 0.51
- Western Mich: 0.52, 0.5, 0.56
- Georgia State: 0.42, 0.41, 0.51
- Georgia Southern: 0.47, 0.39, 0.5
- San Diego State: 0.67, 0.64

Actual = $0.46

- FY 2009
- FY 2010
- FY 2011

STATUS - HOLD
GOAL #6 - Promote Good Stewardship

<table>
<thead>
<tr>
<th>Strategy</th>
<th>6.1</th>
<th>Promote Fiscal Responsibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Objective</td>
<td>6.1.4</td>
<td>Achieve Custodial Costs/Student FTE Plus or Minus 5% of the APPA Average for Peer Institutions (Internal UNC Peers = East Carolina, Greensboro) (National Peers = University of Maryland-Baltimore County, UNLV, University of Texas at Arlington, University of Texas at San Antonio, Western Michigan University).</td>
</tr>
</tbody>
</table>

**ACTION PLAN**

- **Actions Complete**
  - Changed objective from cost per GSF to cost per student FTE

- **Actions Planned**
  - Monitor and report custodial cost/student FTE on an annual basis using data from APPA survey
Facilities Management Strategic Planning Session - 3rd Quarter FY 2012

GOAL #6 - Promote Good Stewardship

**Strategy  6.1** Promote Fiscal Responsibility

**Objective  6.1.4** Achieve Custodial Costs/Student between Plus or Minus 5% of the APPA Average for Peer Institutions (Internal UNC Peers = East Carolina, Greensboro) (National Peers – University of Maryland-Baltimore County, UNLV, University of Texas at Arlington, University of Texas at San Antonio, Western Michigan University.)

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

**Balanced Scorecard Category:** Financial Perspective

---

**STATUS**

Avg. cost/student = $338.35

UNCC = 37% below average

$355.26 plus 5% of avg.

$321.43 minus 5% of avg.
GOAL #6 - Promote Good Stewardship

<table>
<thead>
<tr>
<th>Strategy</th>
<th>Objective</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>6.1</td>
<td>6.1.5</td>
<td>Achieve Total Maintenance Cost/GSF to 5% below the APPA Southeast Region Average</td>
</tr>
<tr>
<td>6.1.6</td>
<td></td>
<td>Achieve Total Landscape Cost/Acre 5% below the APPA Southeast Region Average</td>
</tr>
<tr>
<td>6.1.7</td>
<td></td>
<td>Exceed Labor Services Payroll requirements by 10%</td>
</tr>
</tbody>
</table>

**ACTION PLAN**

- Actions Planned
  1. Make sure that data submitted is correct.
  2. Continue to look for opportunities to expand reimbursable PM work to level peaks and valleys.
  3. Continue to look within our Facilities Operations Labor pool before going outside for additional staff support.
  4. Utilize UPA to help identify when falling behind in data entry
Facilities Management Strategic Planning Session - Third Quarter FY 2012

GOAL #6 – Promote Good Stewardship

Strategy 6.1 Promote Fiscal Responsibility
Objective 6.1.5 Achieve Total Maintenance Cost/GSF ± 5% of APPA Average for Peer Group.

Measure: Maintenance cost/GSF from annual APPA Facilities Performance Indicators Report (APPA Benchmark)

Balanced Scorecard Category: Financial Perspective

Note: Peer average does not include institutions not reporting nor those which included auxiliaries (Western Michigan).
Facilities Management Strategic Planning Session - Third Quarter FY 2012

GOAL #6 - Promote Good Stewardship

Strategy 6.1 Promote Fiscal Responsibility

Objective 6.1.6 Achieve Total Landscape Cost/Acre ± 5% of APPA Average for Peer Group.

Measure: Landscape cost/Acre from annual APPA Facilities Performance Indicators Report (APPA Benchmark)

Balanced Scorecard Category: Financial Perspective
Facilities Management Strategic Planning Session – Third Quarter FY 2012

GOAL #6 – Promote Good Stewardship

<table>
<thead>
<tr>
<th>Strategy</th>
<th>6.1</th>
<th>Promote Fiscal Responsibility</th>
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</thead>
<tbody>
<tr>
<td>Objective</td>
<td>6.1.7</td>
<td>Exceed Labor Services Payroll requirements by 10%</td>
</tr>
</tbody>
</table>

**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 $**

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Qtr</td>
<td>$380,286.06</td>
</tr>
<tr>
<td>2nd Qtr</td>
<td>$185,948.04</td>
</tr>
<tr>
<td>3rd Qtr</td>
<td>$330,614.34</td>
</tr>
<tr>
<td>Average</td>
<td>$284,040.00</td>
</tr>
</tbody>
</table>

---

**STATUS**
Facilities Management Strategic Planning Session - First Quarter FY 2012

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
3rd Qtr FY12

<table>
<thead>
<tr>
<th>Year/Quarter</th>
<th>Total FY To Date</th>
<th>Landfilled</th>
<th>Recycled</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011 Year</td>
<td></td>
<td>198</td>
<td>417</td>
</tr>
<tr>
<td>1st Qtr FY12</td>
<td></td>
<td>75</td>
<td>91</td>
</tr>
<tr>
<td>2nd Qtr FY12</td>
<td></td>
<td>32</td>
<td>110</td>
</tr>
<tr>
<td>3rd Qtr FY12</td>
<td></td>
<td>60</td>
<td>78</td>
</tr>
<tr>
<td>Total FY To Date</td>
<td></td>
<td>42%</td>
<td>185</td>
</tr>
</tbody>
</table>
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
  – New waste contract is in effect – under this contract, our C&D rolloffs will be hauled to a facility that will try to sort materials.
  – All campus buildings built after 1984 have been approved for ceiling tile recycling through Armstrong’s program
  – Residence Life has signed contract with Mattress Go Round – this should help keep mattresses from being put in our C&D bins.

• Actions Planned
  – Need to determine method to separate Surplus materials and items from Residence Life out; right now they count against our recycling rates.
  – Continue working on ceiling tile recycling – get approval for older buildings that have been abated and work on a roll-off option for recycling smaller projects.
Facilities Management Strategic Planning Session – First Quarter FY 2012

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

Capital Projects - Materials Disposed
3rd Qtr FY12
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
  – .

• Actions Planned
  – Continue monitoring projects and acting as resource for contractors.
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
GOAL #6 - Promote Good Stewardship

<table>
<thead>
<tr>
<th>Strategy</th>
<th>6.2</th>
<th>Objective</th>
<th>6.2.3</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Develop a Sustainable Campus</td>
<td>Increase Percent of Solid Waste Recycled on Campus by 5% in five year (base year 2008)</td>
</tr>
</tbody>
</table>

**ACTION PLAN**

- **Actions Planned**
  - Continue to provide timely and efficient collection service of recyclable and reusable items to the entire campus
  - Designing Zero Waste Options for FOOTBALL- work with FOOTBALL committees
  - Designing Comprehensive Compost program for campus
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**
  - Complete STARS Assessment
  - Submit CAP to ACUPCC
  - GHG Inventory 2 – data gathering
  - Campus Sustainability Report (draft)
Facilities Management Strategic Planning Session – 2nd Quarter FY 2012

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/YEAR

<table>
<thead>
<tr>
<th>Year</th>
<th>Base Year</th>
<th>FY2015 Goal</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY03</td>
<td>124</td>
<td>87</td>
</tr>
<tr>
<td>FY04</td>
<td>111</td>
<td>103</td>
</tr>
<tr>
<td>FY05</td>
<td>117</td>
<td>119</td>
</tr>
<tr>
<td>FY06</td>
<td>120</td>
<td></td>
</tr>
<tr>
<td>FY07</td>
<td>125</td>
<td></td>
</tr>
<tr>
<td>FY08</td>
<td>120</td>
<td></td>
</tr>
<tr>
<td>FY09</td>
<td>127</td>
<td></td>
</tr>
<tr>
<td>FY10</td>
<td>125</td>
<td>99</td>
</tr>
<tr>
<td>FY11</td>
<td>119</td>
<td></td>
</tr>
<tr>
<td>FY12</td>
<td></td>
<td></td>
</tr>
<tr>
<td>FY13</td>
<td></td>
<td></td>
</tr>
<tr>
<td>FY14</td>
<td></td>
<td></td>
</tr>
<tr>
<td>FY15</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
GOAL #6 – Promote Good Stewardship

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

ACTION PLAN - ENERGY

• Actions Planned
  ▪ Complete Engineering and Zone coordination for energy operation.
  ▪ Retro-commission Rowe
  ▪ Retro-commission Robinson
  ▪ Activate CCB building schedule
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 Planned
  ▪ Investment Grade Audit (IGA) submission to SCO
  ▪ Finalize ECMs.

• Schedule
  ▪ Present to SCO in May
  ▪ Present to Counsel of State in Jun-Jul
  ▪ Start construction late Summer.
GOAL #6 - Promote Good Stewardship

Strategy 6.5 Improve Historically Underutilized Business (HUB) Participation

ACTI ON PLANS FOR IMPROVEMENT

Continue –

- Work with CM firms in review of 1st Tier Subcontractors MBE Affidavits and “Good Faith Effort” documentation to ensure compliance. Hold CM firms accountable!
- Work with University staff/GCs/agencies/organizations, etc. to identify and promote utilization of HUB firms
- Program Compliance
- Education & Outreach
Facilities Management Strategic Planning Session - Third Quarter FY 2012

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

Balanced Scorecard Category: Financial Perspective

HUB Participation
Capital Projects >$500K

<table>
<thead>
<tr>
<th>Year</th>
<th>Total Projects Completed</th>
<th>Projects with 12% HUB Participation</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY2011</td>
<td>67%</td>
<td>0%</td>
</tr>
<tr>
<td>1st Qtr FY12</td>
<td>80%</td>
<td>100%</td>
</tr>
<tr>
<td>2nd Qtr FY12</td>
<td>100%</td>
<td>0%</td>
</tr>
<tr>
<td>3rd Qtr FY12</td>
<td></td>
<td></td>
</tr>
<tr>
<td>FY12 YTD</td>
<td>86%</td>
<td></td>
</tr>
</tbody>
</table>

80% GOAL
Facilities Management Strategic Planning Session - Third Quarter FY 2012

GOAL #6 - Promote Good Stewardship

Strategy 6.5 Improve African American Participation on Capital Projects
Objective 6.5.2 3% overall African American Participation on Capital Projects $500K and above

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

Balanced Scorecard Category: Financial Perspective
Facilities Management Strategic Planning Session - Third Quarter FY 2012

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

Balanced Scorecard Category: Financial Perspective

Informal Projects ≥$30K
HUB Participation

<table>
<thead>
<tr>
<th></th>
<th>Total Informal Project Dollars</th>
<th>Informal Project Dollars w/HUB Firms</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY 2011</td>
<td>44%</td>
<td>13%</td>
</tr>
<tr>
<td>1st Qtr FY 12</td>
<td>5%</td>
<td>0%</td>
</tr>
<tr>
<td>2nd Qtr FY 12</td>
<td>57%</td>
<td>25%</td>
</tr>
<tr>
<td>3rd Qtr FY 12</td>
<td></td>
<td></td>
</tr>
<tr>
<td>FY 12 YTD</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Status:
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 FOR IMPROVEMENT

☐ Amanda Caudle assigned as Design Service Coordinator to work with Dorothy Vick, Doug Pierce and JOC Contractors in seeking new HUB Contractor opportunities - All Coordinators are encouraged to try new vendors for work on our Under $30 K projects. Amanda advises other Coordinators of new opportunities - This is ongoing.

☐ Continue refining HUB reporting information in regards to Strategic Planning information - This is ongoing.

☐ Continue to work with FIS on reports for extracting project data from Archibus - This is ongoing.
Facilities Management Strategic Planning Session - Third Quarter FY 2012

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: Internal Business Process

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 '09</td>
<td>$ 996,756</td>
<td>$ 88,479</td>
<td>9.0%</td>
</tr>
<tr>
<td>FY '10</td>
<td>$ 1,452,202</td>
<td>$ 88,703</td>
<td>6.1%</td>
</tr>
<tr>
<td>FY '11</td>
<td>$ 3,924,102</td>
<td>$ 857,125</td>
<td>21.8%</td>
</tr>
<tr>
<td>QTR 1</td>
<td>$ 798,506</td>
<td>$ 175,620</td>
<td>22.0%</td>
</tr>
<tr>
<td>QTR 2</td>
<td>$ 946,904</td>
<td>$ 308,402</td>
<td>32.6%</td>
</tr>
<tr>
<td>QTR 3</td>
<td>$ 906,531</td>
<td>$ 283,695</td>
<td>31.3%</td>
</tr>
<tr>
<td>QTR 4</td>
<td>$ -</td>
<td>$ -</td>
<td>0.0%</td>
</tr>
<tr>
<td>FY '12 STATUS</td>
<td>$ 2,651,941</td>
<td>$ 767,717</td>
<td>28.9%</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 '09</td>
<td>$ 996,756</td>
<td>$ 40,894</td>
<td>4.1%</td>
</tr>
<tr>
<td>FY '10</td>
<td>$ 1,452,202</td>
<td>$ 73,987</td>
<td>5.1%</td>
</tr>
<tr>
<td>FY '11</td>
<td>$ 3,924,102</td>
<td>$ 77,377</td>
<td>2.0%</td>
</tr>
<tr>
<td>QTR 1</td>
<td>$ 798,506</td>
<td>$ 700</td>
<td>0.1%</td>
</tr>
<tr>
<td>QTR 2</td>
<td>$ 946,904</td>
<td>$ 25,850</td>
<td>2.7%</td>
</tr>
<tr>
<td>QTR 3</td>
<td>$ 906,531</td>
<td>$ 4,350</td>
<td>0.5%</td>
</tr>
<tr>
<td>QTR 4</td>
<td>$ -</td>
<td>$ -</td>
<td>0.0%</td>
</tr>
<tr>
<td>FY '12 STATUS</td>
<td>$ 2,651,941</td>
<td>$ 30,900</td>
<td>1.2%</td>
</tr>
</tbody>
</table>
## Balance Score Card

### DISCUSSION

### FINANCIAL 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>
<th>3rd Quarter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage Budget</td>
<td>6.1.1</td>
<td>Balanced Budget @ End of Year</td>
<td></td>
<td>100%</td>
<td>64.38%</td>
<td>Annual FY 11</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Maximize Revenue Streams</td>
<td>6.1.2</td>
<td>Increase Grants/Supplemental Funding</td>
<td></td>
<td>25%</td>
<td>?</td>
<td>Annual FY 11</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Promote fiscal responsibility</td>
<td>6.1.3</td>
<td>Admin Cost/GSF +/-5% of APPA Avg for Peer Inst</td>
<td>&quot;$+/5%&quot;</td>
<td>hold</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>6.1.4</td>
<td>Custodial Cost/GSF +/-5% of APPA Avg for Peer Inst</td>
<td>&quot;$+/5%&quot;</td>
<td>37%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>6.1.5</td>
<td>Maint Cost/GSF +/-5% of APPA Avg for Peer Inst</td>
<td>&quot;$+/5%&quot;</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>6.1.6</td>
<td>Landscape Cost/GSF +/-5% of APPA Avg for Peer Inst</td>
<td>&quot;$+/5%&quot;</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>6.1.7</td>
<td>Exceed Labor Services Payroll requirements by 10%</td>
<td>$400,000/qtr</td>
<td>$585,668</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sustainable Practices</td>
<td>6.2.1</td>
<td>C&amp;D Recycling - Informal Projects</td>
<td></td>
<td>50%</td>
<td>42%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>6.2.2</td>
<td>C&amp;D Recycling Capital Projects</td>
<td></td>
<td>50%</td>
<td>?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>6.2.3</td>
<td>Increase % Solid Waste Recycled (Baseline 2008)</td>
<td>5% (29.4%)</td>
<td>33%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>6.2.4</td>
<td>Achieve 60% of STARS credits</td>
<td></td>
<td>50%</td>
<td>n/a</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Conserve Natural Resources</td>
<td>6.3.1</td>
<td>Energy Usage by 2015</td>
<td></td>
<td>-30%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>6.3.2</td>
<td>Water Usage by 2010</td>
<td></td>
<td>-20% or 43 Gal/GSF</td>
<td>n/a</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Improve HUB Participation</td>
<td>6.5.1</td>
<td>12% HUB participation on 80% of Capital Projects</td>
<td></td>
<td>80%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>6.5.2</td>
<td>3% African American Participation on Capital Projects</td>
<td></td>
<td>3%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>6.5.3</td>
<td>13% HUB participation on Informal Proj $30K and above</td>
<td></td>
<td>13%</td>
<td>n/a</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>6.5.4</td>
<td>13% HUB for Informal Proj below $30,000 inc. 3% AA</td>
<td></td>
<td>13%/3%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

To financially sustain our mission, what must we focus on?
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
GOAL #1 - Improve Facilities Operations

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

ACTION PLAN

• 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.
    c) Get supervisors to spot check employees and review white sheets in detail
  2 - Get employees out of the shop
  3 - Adjust goal to 70% (more realistic).
Facilities Management Strategic Planning Session - Third Quarter FY 2012

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)

**Goal:** Greater than 80% for the year

**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%
Objective: 1.2.2 Reduce Average Non-stock Requisition to Receipt Time to 4.0 Days

ACTION PLAN

• Actions Planned
  1 – Continue to add items that have been ordered repeatedly as non-stock items to stock as order-on-request items (carried at an inventory level of “zero” but pre-sourced for faster ordering and delivery). Stock sales continue to increase. Up to 420 (highest recorded).
  2 – Specifically track long lead items and spikes in usage (historically the main causes for inability to fill).
  3 – Monitor and reduce Req to PO processing time (continue to decrease to 7.43 hrs)
  4 – Non-stock items that have been ordered on a recurring basis are being added to stock inventory as ORO (Ordered On Request Only).
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.

Goal: Greater than 97%

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

Strategy: 1.5  Improve Reliability
Objective: 1.5.1 Improve Completion of Preventative Maintenance Work Requests to over 90%
          1.5.2 Decrease number of Unscheduled Equipment Replacement Projects by 15%

ACTION PLAN

• Actions Planned
  1 – Complete development of PM Program. Focus on new buildings (CCB and EPIC)
  2 – Closer monitoring of PM completions by Supervisors and Managers.
  3 – Continue expansion of PM Program and predictive maintenance program. Work with key customers.
  4 – Prepare program for major equipment repairs and replacement.
  5 – Review system projects identified on the R&R list and prioritize. Indicate urgency and recommend future funding dates.
  6 – Continue working with Simplex to bring the new buildings online with the network.
Facilities Management Strategic Planning Session - Third Quarter FY 2012

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)

**Goal:** Greater than 90%

**Balanced Scorecard Category:** Internal Business Process
Facilities Management Strategic Planning Session – Third Quarter FY 2012

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
FM 5YP Prioritized Projects – FY12

1. Capital Renewal/Deferred Maintenance (CRDM) Phase 2 – On HOLD
2. Enterprise Data Assistant (EDA) Recycling Project -Completed
3. Enterprise Data Assistant (EDA) FO-WR Project
4. ARCHIBUS Web Central Space Audit – Drawing Updates -Completed
5. ARCHIBUS - Equipment and PM Management – In Development
6. BAS Critical Alarms – Phase One
7. ARCHIBUS Key Management – Phase Two – Pilot with EPIC
8. Capital Funds Phase Two – On HOLD
9. Motor Fleet -Completed
10. Parking – Pilot test with Admin Completed
11. SAC Billing -Completed
12. Facilities Condition Assessment Program (FCAP2) – In Development
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
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
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 Planned:
1. Enterprise Data Assistant (EDA) FO-WR Project – Continue Pilot with additional users
2. BAS Critical Alarms – Begin Pilot with Bioinformatics.
3. ARCHIBUS Key Management Phase Two – Complete pilot for EPIC. Transition Key Management to other buildings
4. Facilities Condition Assessment Program (FCAP2) – Complete Development perform review and test
5. Equipment and PM Management – Complete Development and Conduct User Acceptance Testing
GOAL #2 - Successfully Adapt Existing Facilities to Meet New Requirements

Strategy 2.3: Improve capital renewal/ deferred maintenance planning, prioritization, estimation, and funding process

Objective 2.3.1. 80% of existing projects documented and input into the CRDM system.

ACTION PLAN

• Actions Planned:
  • Amend the objective above to reflect phase 2
  • Work with other sections in FM on the process.
  • Work with FIS on the dashboard (incl. accuracy)
Facilities Management Strategic Planning Session - Second Quarter FY 2012

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

Strategy 2.3: Improve capital renewal/deferred maintenance planning; prioritization, estimation, and funding process

Objective 2.3.1. 80% of existing projects documented and input into the CRDM system.

Measure: % of projects documented and input into the CRDM system.

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

Strategy 3.1: Improve space utilization throughout the university.

Objective 3.1.1 100% of space audits by Division; Documented and updated into Archibus NLT December 2012.

ACTION PLAN

• Actions Planned:
  o SA audit to be completed by end of summer
  o Athletics audit to be completed by end of summer
  o Spot inspections/ checks continue
  o Add EPIC into Archibus space database
  o Continue updating drawings
Facilities Management Strategic Planning Session - Third Quarter FY 2012

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

**Strategy 3.1:** Improve space utilization throughout the university.

**Objective 3.1.1** 100% of space audits by Division; Documented and updated into Archibus NLT December 2012.

**Measure:** % Initial audits and updates completed.

**Balanced Scorecard Category:** Internal Business Process
GOAL #3 - Deliver New Facilities that Support the University's Mission

**Strategy 3.2** Improve the Six Year Plans for Appropriated & Non-appropriated Capital Improvements

**Objective 3.2.1** 100% of Capital Projects on the Appropriated and Non-Appropriated Six Year Capital Improvements plan are approved and ready for submission to GA by Fall, 2011

### ACTION PLAN

**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

**Actions Planned:**

- **Atkins Library:**
  - Awaiting further info from Library Staff.
  - Looking for a solution to the Broadcast Services space issue.
- **Obtain guidance on direction of CID in order to determine new set of needs.**
- **Begin work on CID projects for hand-off to Capital.**
Facilities Management Strategic Planning Session - Second Quarter FY 2012

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

Strategy 3.2 Improve the Six Year Plans for Appropriated & Non-appropriated Capital Improvements

Objective 3.2.1 100% of Capital Projects on the Appropriated and Non-Appropriated Six Year Capital Improvements Plan are approved and ready for submission to GA by end of FY 12.

Measure: % of projects with completed (pre-programs, OC25s, and Approvals).

Balanced Scorecard Category: Internal Business Process
Facilities Management Strategic Planning Session - Third Quarter FY 2012

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

**Balanced Scorecard Category:** Internal Business Process

<table>
<thead>
<tr>
<th>STRATEGIC REVIEW by Fiscal Year (July-June)</th>
<th>No. of projects authorized in Capstat</th>
<th>Designer under contract within 120 days</th>
<th>Designer not under contract within 120 days</th>
<th>% Designers under contract w/in</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summary FY-09</td>
<td>9</td>
<td>3</td>
<td>4</td>
<td>33%</td>
</tr>
<tr>
<td>Summary FY-10</td>
<td>10</td>
<td>9</td>
<td>3</td>
<td>75%</td>
</tr>
<tr>
<td>Summary FY-11</td>
<td>11</td>
<td>2</td>
<td>6</td>
<td>25%</td>
</tr>
<tr>
<td>1st Qtr. FY-12</td>
<td>2</td>
<td>2</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>2nd Qtr. FY-12</td>
<td>3</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>3rd Qtr. FY-12</td>
<td>1</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>4th Qtr. FY-12</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
</tbody>
</table>

Objective for 3rd Quarter is n/a%  
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 3.3.1 90% of designers under contract within 120 days of Project posting in CAPSTAT

ACTION PLAN

• Actions Completed
  N/A

• Actions Planned
  1. Baseline Schedules – Accurate
  2. Baseline Schedules – Refer to them
  3. Push Designers to get fee estimates in promptly
  4. Work to allow staff to conduct designer interview without BOT chair.
Facilities Management Strategic Planning Session - Third Quarter FY 2012

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

**Strategy 3.3**

**Objective 3.3.2**

*Improve the Capital Design Process*

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%</td>
</tr>
<tr>
<td>Summary FY-10</td>
<td>9</td>
<td>5</td>
<td>63%</td>
</tr>
<tr>
<td>Summary FY-11</td>
<td>6</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>1st Qtr. FY-12</td>
<td>0</td>
<td>0</td>
<td>n/a</td>
</tr>
<tr>
<td>2nd Qtr. FY-12</td>
<td>1</td>
<td>1</td>
<td>50%</td>
</tr>
<tr>
<td>3rd Qtr. FY-12</td>
<td>4</td>
<td>2</td>
<td>67%</td>
</tr>
<tr>
<td>4th Qtr. FY-12</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
</tbody>
</table>

**Objective for 3rd Quarter is 67%**

**Year to date is 75%**
GOAL #3 - Deliver New Facilities that Support the University’s Mission

<table>
<thead>
<tr>
<th>Strategy</th>
<th>Objective</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.3</td>
<td>3.3.2</td>
<td>Improve the Capital Design Process 90% of designs complete by the scheduled completion date</td>
</tr>
</tbody>
</table>

**ACTION PLAN**

- Actions Completed
  
  N/A

- Actions Planned
  
  1. Baseline Schedules – Accurate
  2. Baseline Schedules – Refer to them
  3. Keep end users up to date on overall schedule
Facilities Management Strategic Planning Session - Third Quarter FY 2012

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 Contract</th>
<th>Percent Difference Between Initial &amp; Final Contract</th>
<th>Completed Within Design Budget (1=yes, 0=no)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Football/Sports</td>
<td>$3,950,000</td>
<td>$3,166,022</td>
<td>$3,404,882</td>
<td>-19.8%</td>
<td>7.5%</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>0.2%</td>
<td>0</td>
</tr>
<tr>
<td>Parking Deck I</td>
<td>$1,701,000</td>
<td>$1,044,000</td>
<td>$1,136,083</td>
<td>-38.6%</td>
<td>8.8%</td>
<td>0</td>
</tr>
<tr>
<td>Parking Deck J</td>
<td>$2,211,057</td>
<td>$946,200</td>
<td>$946,200</td>
<td>-57.2%</td>
<td>0.0%</td>
<td>1</td>
</tr>
<tr>
<td>PORTAL</td>
<td>$2,466,950</td>
<td>$2,200,000</td>
<td>$2,200,000</td>
<td>-10.8%</td>
<td>0.0%</td>
<td>1</td>
</tr>
<tr>
<td>RDH Renovation</td>
<td>$1,742,048</td>
<td>$1,981,410</td>
<td>$1,987,410</td>
<td>13.7%</td>
<td>0.3%</td>
<td>0</td>
</tr>
<tr>
<td>Res. Hall Ph. X</td>
<td>$2,809,632</td>
<td>$2,147,890</td>
<td>$2,147,890</td>
<td>-23.6%</td>
<td>0.0%</td>
<td>1</td>
</tr>
<tr>
<td>Res. Hall Ph. XI</td>
<td>$3,695,657</td>
<td>$2,078,598</td>
<td>$2,078,598</td>
<td>-43.8%</td>
<td>0.0%</td>
<td>1</td>
</tr>
<tr>
<td>Res. Hall Ph XII</td>
<td>$3,400,667</td>
<td></td>
<td></td>
<td>0.0%</td>
<td>0.0%</td>
<td>0</td>
</tr>
<tr>
<td>Res. Hall Scott</td>
<td>$265,817</td>
<td>$210,000</td>
<td>$210,000</td>
<td>0.0%</td>
<td>0.0%</td>
<td>1</td>
</tr>
<tr>
<td>RUP IV</td>
<td>$385,000</td>
<td>$385,000</td>
<td></td>
<td>0.0%</td>
<td>0.0%</td>
<td>1</td>
</tr>
</tbody>
</table>

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

Objective is 90%
GOAL #3 – Deliver New Facilities that Support the University’s Mission

<table>
<thead>
<tr>
<th>Strategy</th>
<th>3.3</th>
<th>Improve the Capital Design Process</th>
</tr>
</thead>
<tbody>
<tr>
<td>Objective</td>
<td>3.3.3</td>
<td>90% of designs complete within design budgeted fee</td>
</tr>
</tbody>
</table>

ACTION PLAN

• Actions Completed

• Actions Planned
  1. Print project budget / financial sheets & share with end users
  3. Protect contingency
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

*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

<table>
<thead>
<tr>
<th>Strategy</th>
<th>3.4</th>
<th>Improve Administration of the Capital Construction Process</th>
</tr>
</thead>
<tbody>
<tr>
<td>Objective</td>
<td>3.4.2</td>
<td>95% of Capital Projects completed within the original construction contract amount or Guaranteed Maximum Price (GMP) plus 3% (contingency)</td>
</tr>
</tbody>
</table>

**ACTION PLAN**

- Actions Planned
  1. Maintain & Print project budgets & account reports monthly
  2. Share budgets with AVC and end users.
  3. Hold contingency for unforeseen conditions & project requirements.
  4. Manage scope creep.
GOAL #3 - Deliver New Facilities that Support the University's Mission

Strategy 3.5: Improve Infrastructure improvement planning

Objective 3.5.1. 80% of infrastructure projects integrated into Capital Construction Project Scopes

ACTION PLAN

• Actions Planned:
  o Ensure projects in CRDM are appropriately listed – Parent/ Child relationships
  o Update and review projects based on updated information.
  o Integrate CID information – above and below the line. Move projects as applicable.
Facilities Management Strategic Planning Session - Second Quarter FY 2012

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

**Strategy 3.5:** Improve Infrastructure improvement planning

**Objective 3.5.1.** 80% of infrastructure projects integrated into Capital Construction Project Scopes

**Measure:** % infrastructure projects associated with Capital Projects on the 6 year plan (appropriated and non-appropriated)

**Balanced Scorecard Category:** Internal Business Process

---

<table>
<thead>
<tr>
<th>Quarterly Status</th>
<th>Percentage of Completion</th>
</tr>
</thead>
<tbody>
<tr>
<td>3rd Qtr FY 11</td>
<td>100%</td>
</tr>
<tr>
<td>4th Qtr FY 11</td>
<td>100%</td>
</tr>
<tr>
<td>1st Qtr FY 12</td>
<td>100%</td>
</tr>
<tr>
<td>2nd Qtr FY 12</td>
<td>100%</td>
</tr>
</tbody>
</table>
GOAL #3 - Deliver New Facilities that Support the University’s Mission

Strategy 3.6: Improve and Manage Campus Design Guidelines, Standards and Specifications

Objective 3.6.1. 80% of revisions integrated into the Design and Construction Manual based upon periodic review and updates.

**ACTION PLAN**

- **Actions Planned:**
  - Receive input from the Departments
  - Compile changes
  - Conduct next committee meeting and updates
Facilities Management Strategic Planning Session - Second Quarter FY 2012

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

**Strategy 3.6:** Improve and Manage Campus Design Guidelines, Standards and Specifications

**Objective 3.6.1.** 80% of revisions integrated into the Design and Construction Manual based upon periodic review and updates.

**Measure:** % of sections updated and posted.

**Balanced Scorecard Category:** Internal Business Process
## DISCUSSION

### INTERNAL PROCESSES PERSPECTIVE

<table>
<thead>
<tr>
<th>Internal Processes</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>
<th>3rd Quarter</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Labor Availability</strong></td>
<td>1.1.1</td>
<td>Increase Wrench Time</td>
<td>&gt;90%</td>
<td>81.00%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Logistics Efficiency</strong></td>
<td>1.2.1</td>
<td>Stock Fill Rate</td>
<td>&gt;97%</td>
<td>92.75%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Optimize Supply Chain</strong></td>
<td>1.2.2</td>
<td>Non-stock cycle time (request to receipt time)</td>
<td>&lt;4 days</td>
<td>3.46</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Improve Process Reliability</strong></td>
<td>1.5.1</td>
<td>On-time Prev. Maintenance completion</td>
<td>&gt; 90%</td>
<td>80.54%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Manage Technical Resources</strong></td>
<td>2.1.1</td>
<td>Completion of FM 5-YR Tech. Plan by 2015</td>
<td>100%</td>
<td>70.42%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Master/Project Planning Process</strong></td>
<td>2.3.1</td>
<td>80% of Existing Projects Documented and Input into the CRDMS by ____</td>
<td>80%</td>
<td>95%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>3.1.1</td>
<td>100% of Space Audits by Division; Documented and Updated into Archibus NLT December 2012.</td>
<td>100%</td>
<td>89%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>3.2.1</td>
<td>100% of Capital Projects on the Appropriated and Non Appropriated Six Year Capital Improvements Plan approved and ready for submission to GA by end of FY12</td>
<td>100%</td>
<td>100%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Capital Project Administration</strong></td>
<td>3.3.1</td>
<td>Designers Under Contract w/in 120 days of Posting in CAPSTAT</td>
<td>90% w/in 120</td>
<td>100%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>3.3.2</td>
<td>90% of Designs Complete by Scheduled Comp. Date</td>
<td>90%</td>
<td>63%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>3.3.3</td>
<td>90% of Designs w/in Design Budgeted Fee</td>
<td>90%</td>
<td>100%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>3.4.1</td>
<td>90% of Capital construction Projects Completed on Time</td>
<td>90%</td>
<td>50%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>3.4.2</td>
<td>95% of Cap Prof completed w/in orig contract or GMP</td>
<td>95%</td>
<td>90%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>3.5.1</td>
<td>80% of Infrastructure Projects Integrated into Capital Construction Project Scopes</td>
<td>80%</td>
<td>?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>3.6.1</td>
<td>80% of Revisions Integrated into the Design and Construction Manual.</td>
<td>80%</td>
<td>?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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 - 3rd Quarter FY 2012

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

Objective  5.1.2  Benchmark vacancy time of no longer than 120 calendar days - Exempt

Objective  5.1.2  100% of positions filled through targeted selection process by FY 2010

ACTION PLAN

- Experiencing delays across the board in processing due to Campus HR’s new HRMM (People Admin) implementation; To assist, in some cases, we have temporarily been doing actual keying of paperwork for Supervisors, Managers, and Directors (new positions). We have also had individual meetings to help explain the process. Campus HR has also scheduled meetings to go through the process. As more guidance on process is obtained from Campus HR, we plan to pass this on.

- Continue to work with Budget Office and monitor days unfilled. Currently, receiving a periodic report that provides days vacant. Special note for those positions nearing the 6 month vacant status. These are reported to OSP.

- W.I.G. Develop Targeted Selection on-line training session
Facilities Management Strategic Planning Session - 3rd Quarter FY 2012

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:  
Innovation and Learning Perspective/Learning and Growth

Average Number of Days to Fill Nonexempt (Hourly) Vacancies

Goal: 80 days
Facilities Management Strategic Planning Session - 3rd Quarter FY 2012

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

Strategy 5.1
Objective 5.1.1
  Recruit a talented and diverse workforce in a timely fashion
  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: Innovation and Learning Perspective/Learning and Growth

Average Number of Days to Fill Exempt (Salaried) Vacancies

Goal: 120 days
Facilities Management Strategic Planning Session - 3rd Quarter FY 2012

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

Strategy 5.1
Objective 5.1.2
Recruit a talented and diverse workforce in a timely fashion
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>10</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Q2</td>
<td>24</td>
<td>23</td>
<td>1</td>
</tr>
<tr>
<td>Q3</td>
<td>12</td>
<td>12</td>
<td>0</td>
</tr>
</tbody>
</table>

Status: 90%
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 of per year.

Objective 5.2.2 Increase Employee training to 20 Hours per year.

ACTION PLAN

- Create a “graduation acknowledgement” for participants of the Leadership Academy that completed the program during next AEM.

- Continue to identify areas for skill development and enhancement for staff. Work to create programs around these areas.

- Identify resources in the Charlotte region that can provide cost-effective, quality training for employees. Attempt to get best “bang for the buck” in this area, reduce travel costs if possible and reach the majority of our employees within targeted training area.

- W.I.G.#1 – Develop a funding distribution model for FM training; Continue networking with peer institutions to determine best practices, then incorporate into annual fiscal plan;
Facilities Management Strategic Planning Session - 3rd Quarter FY 2012

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 12**

*Training Hours for Supervisors & Managers by Quarter*

- **Annual Target** = 40 hrs ea
  
  \[(43 \times 40 \text{ hrs ea} = 1,720 \text{ hrs})\]

- **Fiscal 2012 Results:**
  - **Goal** 1,720 hrs
  - **Actual** 1,397 hrs (81%)

---

**Status**
Facilities Management Strategic Planning Session - 3rd Quarter FY 2012

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 12**

*Training Hours by Quarter (non-management)*

- **Q1:** 495 hrs
- **Q2:** 643.25 hrs
- **Q3:** 1,011.5 hrs
- **Q4:** 2,149.75 hrs

**Annual Target - 20 hrs ea**

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

**Fiscal 2012 Results:**

- **Goal:** 6,460 hrs
- **Actual:** 2,149.75 hrs (33%)

---

**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%

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

- Survey administration and briefing complete. Final Report under review;
- Overall satisfaction rating = 89%.
- Top five challenges for FM under review by Leadership Team; Problem statements development underway.
Facilities Management Strategic Planning Session – 3rd Quarter FY 2012

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

Annual Target – 14%

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Annual Employee Turn-over Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q1</td>
<td>2%</td>
</tr>
<tr>
<td>Q2</td>
<td>1%</td>
</tr>
<tr>
<td>Q3</td>
<td>4%</td>
</tr>
</tbody>
</table>

Series2

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

Turnover Rates – Historical Data

<table>
<thead>
<tr>
<th>Year</th>
<th>Departures</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY09-10</td>
<td>31 8%</td>
</tr>
<tr>
<td>FY10-11</td>
<td>35 9%</td>
</tr>
<tr>
<td>FY11-12</td>
<td>12 3%</td>
</tr>
</tbody>
</table>
Facilities Management Strategic Planning Session - 3rd Quarter FY 2012

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

**Measure:** Annual Employee Satisfaction Survey Overall Job Satisfaction Survey Question

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

---

**Overall Satisfaction**

*Overall, how satisfied are you working in the Facilities Management Department (2011)*

Average = 4.48

89% of all respondents expressed satisfaction with working in Facilities Management, matching the total from the 2009 survey. When examining the current data by department, the lowest levels of satisfaction come from Facilities Operations (87%) and Capital Projects (89%).
GOAL #6 – Promote Good Stewardship

Strategy 6.4 Improve Employee Safety
Objective 6.4.1 Reduce Accidents to 0 Annually

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

Goal: =0

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

“Safety Is No Accident”
## 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>
<th>3rd Quarter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Learning &amp; Growth</td>
<td>5.1.1</td>
<td>Develop high-quality staff</td>
<td>Reduce Vacancy Time Calendar Days</td>
<td>80 days/120 days</td>
<td>233 / 0</td>
<td>Green</td>
<td>Red</td>
<td>Red</td>
</tr>
<tr>
<td>Retain high quality staff</td>
<td>5.3.1</td>
<td>Retain high quality staff</td>
<td>Reduce Annual Turnover Rate</td>
<td>&lt;14%</td>
<td>4.0%</td>
<td>Green</td>
<td>Red</td>
<td>Red</td>
</tr>
<tr>
<td>Improve Employee Safety</td>
<td>6.4.1</td>
<td>Improve Employee Safety</td>
<td>Reduce Accidents to 0 (CY)</td>
<td>0</td>
<td>6</td>
<td>Green</td>
<td>Red</td>
<td>Calendar Year</td>
</tr>
</tbody>
</table>
Group Discussion