Strategic Planning Session
Fourth Quarter – Fiscal Year 2010
July 30, 2010
First Shift
Strategic Planning Session
Fourth Quarter – Fiscal Year 2010
July 30, 2010
Second and Third Shift

...Creating a Campus of Distinction
Setting a goal is not the main thing. It is deciding how you will go about achieving it and staying with that plan.
Balance Score Card

CUSTOMER Perspective

Strategic Objectives:
- Customer Satisfaction
- Enhance Customer Satisfaction
“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 #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

<table>
<thead>
<tr>
<th>Year</th>
<th>Overall Satisfaction (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY 2008</td>
<td>69</td>
</tr>
<tr>
<td>FY 2009</td>
<td>N/A</td>
</tr>
<tr>
<td>FY 2010</td>
<td>89</td>
</tr>
</tbody>
</table>

Goal = 85%
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
  ✓ Met with Urban Institute to discuss service provision and administration of survey;
  ✓ Spoke with Design Services Director regarding incorporation of their department into the overall survey and inclusion into the survey development.
  ✓ Survey conducted March – April 2010.

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

<table>
<thead>
<tr>
<th>Unit</th>
<th>2008 Rating (%)</th>
<th>2010 Rating (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Motorfleat</td>
<td>84</td>
<td>93</td>
</tr>
<tr>
<td>Business Office</td>
<td>59</td>
<td>89</td>
</tr>
<tr>
<td>M&amp;O Repairs</td>
<td>66</td>
<td>89</td>
</tr>
<tr>
<td>Housekeeping</td>
<td>65</td>
<td>82</td>
</tr>
<tr>
<td>Recycling</td>
<td>87</td>
<td>96</td>
</tr>
<tr>
<td>Grounds</td>
<td>84</td>
<td>91</td>
</tr>
</tbody>
</table>
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 Complete
  ✓ Met with Urban Institute to discuss service provision and administration of survey;
  ✓ Spoke with Design Services Director regarding incorporation of their department into the overall survey and inclusion into the survey development.
  ✓ Spoke with Facilities Information Systems Director regarding incorporation of their department into the overall survey and inclusion into the survey development.
  ✓ External customers: Survey conducted by Urban Institute (March – April 2010).
  ✓ Facilities Business Office:
    ✓ Internal Customers: Met with key stakeholders to review current business tools for continuous improvement (May 12th, 2010).

• Actions Planned
  – Facilities Business Office:
    • Identify key opportunities for performance enhancements
    • Develop strategic goals (short-term and long-term) to address customer needs expressed
  – Strategic Planning session on Customer Service to be held July 30th with Juanita Coston of Coston Associates.
Facilities Management Strategic Planning Session - Fourth Quarter FY 2010

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 FY09 Average of 148 (Goal = 133)

Measure: Number of hot/cold calls submitted on work requests. 4th Qtr – Too Hot = 116  Too Cold = 48

Goal: Less than 133 per quarter annual average

Balanced Scorecard Category: Customer Perspective

![Graph showing Hot and Cold Calls for different quarters]

**Goal**
Avg < 133 quarterly
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 – Made repairs to HVAC Systems.

• 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 - Fourth Quarter FY 2010

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 Surveys Completed</th>
<th>Very Satisfied</th>
<th>Satisfied</th>
<th>Somewhat Satisfied</th>
<th>Neutral</th>
<th>Somewhat Dissatisfied</th>
<th>Unsatisfied</th>
<th>Percent Satisfied or Very 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</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</td>
<td>0.0%</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>9</td>
<td>6</td>
<td>2</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>0</td>
<td>88.9%</td>
</tr>
<tr>
<td>QTR 3</td>
<td>11</td>
<td>4</td>
<td>3</td>
<td>1</td>
<td>2</td>
<td>1</td>
<td>0</td>
<td>77.8%</td>
</tr>
<tr>
<td>QTR 4</td>
<td>9</td>
<td>7</td>
<td>0</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>76.7%</td>
</tr>
<tr>
<td>FY '10 STATUS</td>
<td>30</td>
<td>18</td>
<td>5</td>
<td>2</td>
<td>4</td>
<td>1</td>
<td>0</td>
<td>76.7%</td>
</tr>
</tbody>
</table>

GOAL: 90.0%
FY '10 STATUS: 76.2%
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

4.1.4 - Actions Completed:

☑  "Go live" with Customer Satisfaction Surveys

4.1.4 - Actions Planned:

☐  Monitor Customer Satisfaction Survey responses and implement appropriate actions.
☐  Review with FIS the ability for Design Services to print survey responses from Archibus.
☐  Reaccess the categories for the customer to select from.
☐  Reaccess who receives questionnaire.
☐  Reaccess how we send out the questionnaire.
Facilities Management Strategic Planning Session - Fourth Quarter FY 2010

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 08/09</td>
<td>2</td>
<td>1</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>Summary 09/10</td>
<td>9</td>
<td>0</td>
<td>0</td>
<td>No Data</td>
</tr>
<tr>
<td>1st Qtr. 09/10</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>No Data</td>
</tr>
<tr>
<td>2nd Qtr. 09/10</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>No Data</td>
</tr>
<tr>
<td>3rd Qtr. 09/10</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>No Data</td>
</tr>
<tr>
<td>4th Qtr. 09/10</td>
<td>3</td>
<td>0</td>
<td>0</td>
<td>No Data</td>
</tr>
</tbody>
</table>

No data is a result of customer not answering questionnaire

![Graph showing customer satisfaction](image)
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. Administered satisfaction survey to Deck H customers

• Actions Planned
  – 1. Need to submit satisfaction survey to customers on Tennis Courts, Alumni Parking and New Outdoor Student Rec. Field
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 08/09</td>
<td>no data</td>
<td>0</td>
<td>0</td>
<td>0.0%</td>
</tr>
<tr>
<td>Summary 09/10</td>
<td>5</td>
<td>1</td>
<td>0</td>
<td>20.0%</td>
</tr>
<tr>
<td>1st Qtr. 09/10</td>
<td>no data</td>
<td>0</td>
<td>0</td>
<td>0.0%</td>
</tr>
<tr>
<td>2nd Qtr. 09/10</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>0.0%</td>
</tr>
<tr>
<td>3rd Qtr. 09/10</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.0%</td>
</tr>
<tr>
<td>4th Qtr. 09/10</td>
<td>3</td>
<td>1</td>
<td>0</td>
<td>33.3%</td>
</tr>
</tbody>
</table>

Objective for 4th Quarter is 33%
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

ACTION PLAN

• Actions Complete
  – 1. Administered satisfaction survey to Softball customers

• Actions Planned
NEW Customer Work Request Satisfaction

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

**Objective**: Provide a Positive Customer Experience

**Measure**: Survey Results

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

**Balanced Scorecard Category**: Customer Service
• Actions Complete
  1 –

• Actions Planned
  1 - Review ease of use measure and comments.
  2 – Improve timeliness by continued monitoring of active work requests by Supervisor and four Managers.
Balanced Scorecard
Customer Perspective
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
"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
Facilities Management Strategic Planning Session - Fourth Quarter FY 2010

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 June 30, 2010

<table>
<thead>
<tr>
<th>ACCOUNT DESCRIPTION</th>
<th>2009-10 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>STUDENT AND TEMPORARY WAGES</td>
<td>$39,209</td>
<td>1%</td>
<td>$39,209</td>
<td>-</td>
<td>$39,209</td>
<td>-</td>
<td>$ - F</td>
</tr>
<tr>
<td>PERSONAL SERVICE CONTRACTS</td>
<td>$96,910</td>
<td>3%</td>
<td>$95,387</td>
<td>1,523</td>
<td>$96,910</td>
<td>-</td>
<td>$ - F</td>
</tr>
<tr>
<td>CORPORATE SERVICES CONTRACTS (Srv Agr)</td>
<td>$626,860</td>
<td>21%</td>
<td>$626,044</td>
<td>-</td>
<td>$626,044</td>
<td>816</td>
<td>$ 5,092 F</td>
</tr>
<tr>
<td>OTHER ADMINISTRATIVE EXPENSES</td>
<td>$30,406</td>
<td>1%</td>
<td>$25,234</td>
<td>80</td>
<td>$25,314</td>
<td>5,092</td>
<td>$ 5,092 F</td>
</tr>
<tr>
<td>DOMESTIC TRAVEL/TRAINING</td>
<td>$42,057</td>
<td>1%</td>
<td>$40,301</td>
<td>300</td>
<td>$40,001</td>
<td>1,450</td>
<td>$ 1,450 F</td>
</tr>
<tr>
<td>FIXED PURCHASED SERVICES (Maint Agr)</td>
<td>$239,161</td>
<td>8%</td>
<td>$239,161</td>
<td>-</td>
<td>$239,161</td>
<td>-</td>
<td>$ - F</td>
</tr>
<tr>
<td>OTHER PURCHASED SERVICES</td>
<td>$598,774</td>
<td>20%</td>
<td>$527,719</td>
<td>70,514</td>
<td>$598,233</td>
<td>541</td>
<td>$ 541 F</td>
</tr>
<tr>
<td>SUPPLIES</td>
<td>$1,021,084</td>
<td>34%</td>
<td>$956,072</td>
<td>19,035</td>
<td>$975,106</td>
<td>45,978</td>
<td>$ 45,978 F</td>
</tr>
<tr>
<td>EQUIPMENT</td>
<td>$282,580</td>
<td>9%</td>
<td>$246,480</td>
<td>5,835</td>
<td>$252,315</td>
<td>30,265</td>
<td>$ 30,265 F</td>
</tr>
<tr>
<td>CAPITAL OUTLAY</td>
<td>$3,512</td>
<td>0%</td>
<td>$1,756</td>
<td>1,756</td>
<td>$3,512</td>
<td>-</td>
<td>$ - F</td>
</tr>
<tr>
<td>FIXED CHARGES</td>
<td>$20,303</td>
<td>1%</td>
<td>$20,303</td>
<td>-</td>
<td>$20,303</td>
<td>-</td>
<td>$ - F</td>
</tr>
<tr>
<td>RECYCLING</td>
<td>$36,250</td>
<td>1%</td>
<td>$25,248</td>
<td>-</td>
<td>$25,248</td>
<td>11,002</td>
<td>$ 11,002 F</td>
</tr>
<tr>
<td>FACILITIES MANAGEMENT Main Operating Funds</td>
<td>3,037,106</td>
<td>100%</td>
<td>2,842,913.85</td>
<td>99,041.82</td>
<td>2,941,955.67</td>
<td>95,150.05</td>
<td>$ 95,150 F</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;
  ✓ Development of new budget request tools and comprehensive instructions completed;
  ✓ Rollout of new budget request process with comprehensive instructions occurred on April 2nd;
  ✓ Reviewed existing procurement/budget tracking tools; Met with key stakeholders from Facilities Ops. on May 12th.
  ✓ Development of first training course entitled “How to complete a FM purchase requisition form”. First run to be held on July 12th. Taping scheduled for July 15th. Video to be available no later than last week of July 2010.

• 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 late 2010;
  – Develop scope of analysis and map Motor Fleet procurement/fiscal processes. [Efforts underway; Anticipated completion date: December 2010.];
  – Develop scope of analysis, identify process gaps, prepare input and output gap analysis and create system map of current FM procurement processes. Continue process mapping efforts for the DPR and Purchase Order processes. [Continued efforts postponed due to Year-end closeout and e-procurement];
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>$0</td>
</tr>
<tr>
<td>2009</td>
<td>$0</td>
</tr>
<tr>
<td>2010</td>
<td>$0</td>
</tr>
</tbody>
</table>

- Awards
- Grants
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
  ✓ APPA Grant Application – Take It or Leave It Program
    ▪ Application for Award submitted January 2010
    ▪ Notification from APPA received – WE WON!!!!!

• 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.
  4. Determine best deposit venue for monies received. Dilemma: how to minimize GF restrictions on award monies received; Working with Sponsored Programs, Budget Office and Development to determine viable, legal solution.
Facilities Management Strategic Planning Session - Fourth Quarter FY 2010

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**

- **Target Range:** Between $0.63 and $0.57
- **Actual:** $0.70

- **FY 2008:**
  - UNC Charlotte: 0.40
  - ECU: 0.66
  - UNC-G: 0.60
  - UM-Bcnty: 0.54
  - Utex-San A.: 0.39
  - UNLV: 0.58
  - Western Mich: 0.53
  - SRAPPA: 0.50
  - University System Overall: 0.52

- **FY 2009:**
  - UNC Charlotte: 0.40
  - ECU: 0.66
  - UNC-G: 0.60
  - UM-Bcnty: 0.54
  - Utex-San A.: 0.40
  - UNLV: 0.58
  - Western Mich: 0.60
  - SRAPPA: 0.51
  - University System Overall: 0.56
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

ACTION PLAN

• Actions Complete
  ✓ APPA FY 2009 FPI Survey completed on time; (1st week of December 2009)
  ✓ Participated in new APPA Survey beta test; Survey now includes interactive dashboards.
  ✓ Survey to be published in April 2010.
  ✓ Complete new Budget Realignment Proposal to improve data collection process (proposal must be in effect July 1st).

• Actions Planned
  1. Continue review of survey data;
  2. Analyze impact of administrative staff realignment from FY 08 to FY 09.
  3. Review data collection tools and begin preparations for upcoming FY 10 survey after year-end close out.
  4. Propose FM purchase and use of interactive dashboard reporting to Directors.
Facilities Management Strategic Planning Session - Fourth Quarter FY 2010

GOAL #6 - Promote Good Stewardship

**Strategy 6.1** Promote Fiscal Responsibility

**Objective 6.1.4** Achieve Custodial Costs/GSF 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/GSF from annual APPA Facilities Performance Indicators Report (APPA Benchmark) = Salaries + Supplies/GSF

**Balanced Scorecard Category:** Financial Perspective

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**Custodial-Total Cost/GSF Comparison**

<table>
<thead>
<tr>
<th>Institution</th>
<th>2007 Baseline</th>
<th>$1.38 Target</th>
<th>$1.24 Range</th>
</tr>
</thead>
<tbody>
<tr>
<td>UNC Charlotte</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ECU</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>UNCG</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>UM-BCnty</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>UTex - Arlington</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>UTex - San A.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>UNLV</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Western Mich</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SRAPPA</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

Strategy 6.1 Promote Fiscal Responsibility
Objective 6.1.4 Achieve Custodial Costs/GSF 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.

ACTI ON PLAN

• Actions Complete
  – None

• Actions Planned
  – In depth study of UNCC FM custodial costs/GSF
  – Further investigate why custodial cost per square foot is higher and cost per student lower.
  – Obtain custodial cost/student for our National Peer Institutions
  – Find out if our peers included non-academic spaces in their cost per sq. ft.
  – Begin study to determine possibility of reduction of staff due to budget constraints
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
GOAL #6 - Promote Good Stewardship

Strategy 6.1  Promote Fiscal Responsibility
Objective 6.1.5  Achieve Total Maintenance Cost/GSF to 5% below the APPA Southeast Region Average

**ACTION PLAN**

- Actions Complete
  1 – Pulled data from APPA RPI Report 2007/08.

- Actions Planned
  1 – Review how data was compiled and submitted.
  2 – Meet with FBO and Ray to concur on method for compilation.
Facilities Management Strategic Planning Session - Fourth Quarter FY 2010

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

---

### Grounds-Total Cost/Acre Comparison

<table>
<thead>
<tr>
<th>Institution</th>
<th>2008</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>UNC Charlotte (427 Acres)</td>
<td>$2,792</td>
<td>$6,949</td>
</tr>
<tr>
<td>ECU (200 Acres)</td>
<td>$3,404</td>
<td>$8,080</td>
</tr>
<tr>
<td>UNC-G (56 Acres)</td>
<td>$6,744</td>
<td>$6,006</td>
</tr>
<tr>
<td>UNM-Bent (591 Acres)</td>
<td>$8,960</td>
<td>$8,162</td>
</tr>
<tr>
<td>UCX-Arl (305.6 Acres)</td>
<td>$9,162</td>
<td>$9,162</td>
</tr>
<tr>
<td>UNLV</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Western Mich (1,233 Acres)</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Peer Avg</td>
<td>$3,594</td>
<td></td>
</tr>
</tbody>
</table>

---

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

Strategy 6.1 Promote Fiscal Responsibility
Objective 6.1.6 Achieve Total Landscape Cost/Acre 5% below the APPA Southeast Region Average

ACTION PLAN

• Actions Complete
  2 – Requested additional staffing to raise level of maintenance. No staff provided due to budget constraints.

• Actions Planned
  1 – Review the manner in which data was collected and provided for the FPI Report.
Facilities Management Strategic Planning Session – Fourth Quarter FY 2010

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 $**

<table>
<thead>
<tr>
<th>Quarter</th>
<th>1st Qtr FY10</th>
<th>2nd Qtr FY10</th>
<th>3rd Qtr FY10</th>
<th>4th Qtr FY10</th>
<th>Average FY10</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reimbursable</td>
<td>$412,149</td>
<td>$356,829</td>
<td>$542,091</td>
<td>$547,276</td>
<td>$464,586</td>
</tr>
</tbody>
</table>

**STATUS** 40

---

$400,000/QTR
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 M&O on projects rather than going to outside resources.
  2 – Continued freeze on vacant Labor Services positions.
  3 – Picked up additional reimbursable work at end of the year.

- Actions Planned
  1 – Continue to look for opportunities to expand reimbursable PM work to level peaks and valleys.
  2 – Continue to look within our M&O Labor pool before going outside for additional staff support.
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**

4th Qtr FY10

- **Landfilled**
- **Recycled**

GOAL (35% through 2nd Qtr 10; 50% after)
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**
  - Diversion rate for informal projects is 74% for 4th quarter FY10, and 63% overall for FY10.
  - FINALLY...12 transformers behind Student Health are gone, thanks to Mike B & Anthony H.

- **Actions Planned**
  - Pursue partnerships that allow for alternative disposal methods.
Facilities Management Strategic Planning Session - Fourth Quarter FY 2010

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
4th Qtr FY10

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Tons Disposed</th>
<th>回收比例</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Qtr 10</td>
<td>99%</td>
<td></td>
</tr>
<tr>
<td>2nd Qtr 10</td>
<td>82%</td>
<td></td>
</tr>
<tr>
<td>3rd Qtr 10</td>
<td>97%</td>
<td></td>
</tr>
<tr>
<td>4th Qtr 10</td>
<td>89%</td>
<td></td>
</tr>
<tr>
<td>FY Total</td>
<td>98%</td>
<td></td>
</tr>
</tbody>
</table>

- Landfilled
- Recycled
- GOAL (35% through 2nd Qtr 10; 50% after)
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
  – Diversion rate is 89% for 4\textsuperscript{th} quarter; 98% overall for fiscal year.
  – Increased diversion goal to 50% as discussed at previous Strategic Planning sessions to reflect LEED and UNC Sustainability Policy requirements.

• Actions Planned
  – Participate in LEED class in October.
  – Helping coordinate Construction & Demolition recycling conference in December to strengthen existing partnerships and form new ones.
Facilities Management Strategic Planning Session - Fourth Quarter FY 2010

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>Quarter</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 FY09</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>725 tons</td>
<td>236 tons</td>
</tr>
<tr>
<td>4th Qtr FY10</td>
<td>747 tons</td>
<td>192 tons</td>
</tr>
</tbody>
</table>

- Total Solid Waste
- Total Waste Diverted
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% in five year (base year 2008)

**ACTION PLAN**

**Actions Complete - TOTAL recycling for year 30%**
- Continue to provide timely and efficient collection service of recyclable and reusable items to the entire campus
- Continue outreach efforts to University community (student volunteers, environmental tours, promoted Adopt-A-Spot program (10 groups), advise EARTH Club, Charlotte Green Initiative and Global Architecture Brigade)
  - Held first Keep Charlotte Green Forum – partnered with Library staff
- Continue to chair Carolina Recycling Coalition’s Collegiate Recycling Council.
- Assist Sustainability Coordinator with Zero Waste Goal and **American College & University Climate Commitment**
- Presented and attended the APPA conference in July, accepted national award
- Partnered with Housekeeping – classroom trashcan removal project and pilot office trash can consolidation program

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Total Waste Diverted</th>
<th>Total Solid Waste</th>
<th>% Diverted</th>
<th>Tons diverted</th>
<th>Tons Total Solid Waste</th>
</tr>
</thead>
<tbody>
<tr>
<td>4th Qtr FY08</td>
<td>395,581</td>
<td>1,390,905</td>
<td>28%</td>
<td>198</td>
<td>695</td>
</tr>
<tr>
<td>1st Qtr FY09</td>
<td>487,715</td>
<td>1,435,915</td>
<td>34%</td>
<td>244</td>
<td>718</td>
</tr>
<tr>
<td>2nd Qtr FY09</td>
<td>323,562</td>
<td>1,188,802</td>
<td>27%</td>
<td>162</td>
<td>594</td>
</tr>
<tr>
<td>3rd Qtr FY09</td>
<td>388,609</td>
<td>1,506,909</td>
<td>26%</td>
<td>194</td>
<td>753</td>
</tr>
<tr>
<td>4th Qtr FY09</td>
<td>385,961</td>
<td>1,215,381</td>
<td>32%</td>
<td>193</td>
<td>608</td>
</tr>
<tr>
<td>1st Qtr FY10</td>
<td>392,701</td>
<td>1,239,541</td>
<td>32%</td>
<td>196</td>
<td>620</td>
</tr>
<tr>
<td>2nd Qtr FY10</td>
<td>425,182</td>
<td>1,393,820</td>
<td>31%</td>
<td>213</td>
<td>697</td>
</tr>
<tr>
<td>3rd Qtr FY10</td>
<td>476,987</td>
<td>1,456,207</td>
<td>33%</td>
<td>238</td>
<td>728</td>
</tr>
<tr>
<td>4th Qtr FY10</td>
<td>384,520</td>
<td>1,493,420</td>
<td>26%</td>
<td>192</td>
<td>747</td>
</tr>
</tbody>
</table>

**1st 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
- Continue educational outreach and promotion (Sustainable Campus tour, Adopt-A-Spot program, advising EARTH Club, Global Architecture Brigade and Charlotte Green Initiative)
  - Second Keep Charlotte Green Forum – partnering with Student Union Staff in August
- Coordinate MOVE OUT with Housing and Residence Life
- Coordinate Campus Clean UP
- Design comprehensive food composting program
- Need comprehensive resource management action for all staff at UNC Charlotte
Facilities Management Strategic Planning Session - 4th Quarter FY 2010

GOAL #6 - Promote Good Stewardship

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

Measure: BTUs/GSF/Year consumed on campus

Balanced Scorecard Category: Financial Perspective

CAMPUS ENERGY USAGE
Kbtu/GSF

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

20% Reduction by FY2010
30% Reduction by FY2015

FY 2015 Goal Year
87
GOAL #6 - Promote Good Stewardship

Strategy 6.3  Conserve Natural Resources
Objective 6.3.2  Decrease Water Usage by 20% by FY2010

Measure: Gallons/GSF/Year consumed on campus

Balanced Scorecard Category: Financial Perspective

Still need to reduce water usage to help preserve valuable resources

Existing buildings should use 20% less indoor potable water by Dec 31, 2009 using FY03 base year.
GOAL #6 – Promote Good Stewardship

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

ACTIIONS TO REDUCE CAMPUS ENERGY USAGE

ENGINEERING and ZONE COORDINATION MEETING
August 11, 2010

- Review existing electrical load shedding of HVAC and lighting.
- Establish recommendations for campus wide comfort temperature control.
- Identify details of Zone energy monitoring, i.e. identify checklists needed, measurements, acceptable variances, etc.
- Schedule Engineering meeting with individual Zones to develop plan for buildings within that Zone.
- Identify training needs/requirements.
- Review existing HVAC and lighting setback (buildings and schedules).
GOAL #6 – Promote Good Stewardship

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

**HISTORICAL ACTIONS TO REDUCE CAMPUS ENERGY USAGE**

<table>
<thead>
<tr>
<th>UNCC SCORE SHEET</th>
<th>HISTORICAL ACTIONS TO REDUCE CAMPUS ENERGY USAGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>AGGRESSIVE</td>
<td>PASSIVE</td>
</tr>
<tr>
<td>✅</td>
<td></td>
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<td>✅</td>
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<td>✅</td>
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</tr>
</tbody>
</table>
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>Accidents</th>
</tr>
</thead>
<tbody>
<tr>
<td>CY 2008 YTD</td>
<td>26</td>
</tr>
<tr>
<td>CY 2009 YTD</td>
<td>24</td>
</tr>
<tr>
<td>1st two Qtrs of CY2010</td>
<td>7</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.
Facilities Management Strategic Planning Session - Fourth Quarter FY 2010

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: Internal Business Process

<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>1st Qtr FY10</td>
<td>4</td>
<td>4</td>
<td>100%</td>
</tr>
<tr>
<td>2nd Qtr FY10</td>
<td>1</td>
<td>0</td>
<td>0%</td>
</tr>
<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>YTD</td>
<td>8</td>
<td>4</td>
<td>50%</td>
</tr>
</tbody>
</table>

Steam Infrastructure – Cone/King
Cameron Blvd Resurfacing
Phillips Road Resurfacing

Capital Projects - HUB Participation

- Total Projects Completed
- Projects with 12% HUB Participation
- Percentage of Total Projects with 12% HUB Participation 80% GOAL

FY2010
14 Total/3 HUB – 21.4%
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 Complete
  1. Participated in “Access 2010” – community-wide government procurement conference
  2. Updated University “Vendor Information Guide”

• Actions Planned
  1. Work with CM contractors to identify potential HUB partners
  2. Work with CM contractors to encourage mentor-protégé/partnerships and/or joint venture relationships at 1st tier subcontractor level
  3. Work with CM contractors/agencies/organizations to identify/provide training to promote HUB growth and development
  4. Continue –
     ▪ Encourage GCs to exceed 10% goal
     ▪ Monitor Pay Applications/Good Faith Efforts
     ▪ Provide project/event information to the community
     ▪ Work with GCs/other agencies to identify qualified HUBs
     ▪ Educate business community on the process
     ▪ Community outreach efforts
Facilities Management Strategic Planning Session - Fourth Quarter FY 2010

GOAL #6 - Promote Good Stewardship

Strategy 6.5 Improve Historically Underutilized Business (HUB) Participation
Objective 6.5.2 3% African American participation on 50% of Capital Projects

Measure: Percentage of Individual Capital Projects achieving 3% African American participation

Balanced Scorecard Category: Internal Business Process

<table>
<thead>
<tr>
<th>Strategic Review</th>
<th>Total Projects</th>
<th>Projects with 3% African American Participation</th>
<th>Percentage of Projects with 3% African American Participation</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Qtr FY10</td>
<td>4</td>
<td>1</td>
<td>25%</td>
</tr>
<tr>
<td>2nd Qtr FY10</td>
<td>1</td>
<td>0</td>
<td>0%</td>
</tr>
<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>YTD</td>
<td>8</td>
<td>1</td>
<td>13%</td>
</tr>
</tbody>
</table>

Capital Projects - African American Participation

- Total Projects Completed
- Projects with 3% African American Participation
- Percentage of Projects with 3% African American Participation 50% GOAL

FY2010

- Status

FY2009

- 14 Total – 4AA – 29%
GOAL #6 – Promote Good Stewardship

Strategy 6.5  Improve Historically Underutilized Business (HUB) Participation
Objective 6.5.2  3% African American participation on 50% of Capital Projects

ACTION PLAN

- **Actions Complete**
  1. Met with Metrolina Minority Contractors Association (MMCA) to identify “business development” related training for membership
  2. Conducted overview of Informal Construction process to MMCA membership

- **Actions Planned**
  1. Work with CM Contractors to develop targeted training for subcontractors
  2. Encourage CM Contractors to identify reduced barrier packages to increase HUB participation
  3. Examine Goals & Objectives of the MBE Advisory Committee
  4. Continue –
     - Educate business community on the process
     - Identify qualified HUBs to bid projects
     - Provide project/event information to the community
     - Community outreach efforts
Facilities Management Strategic Planning Session - Fourth Quarter FY 2010

GOAL #6 - Promote Good Stewardship

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

**Objective 6.5.3**
10% of Informal Contract Dollars ($30,000 and above) awarded to HUB Contractors

**Measure:** Percentage of Informal Contract Dollars awarded to HUB Contractors

**Balanced Scorecard Category:** Internal Business Process

<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 10% GOAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Qtr FY10</td>
<td>$273,968</td>
<td>$150,312</td>
<td>55%</td>
</tr>
<tr>
<td>2nd Qtr FY10</td>
<td>$239,600</td>
<td>$0</td>
<td>0%</td>
</tr>
<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>YTD</td>
<td>$2,355,878</td>
<td>$490,336</td>
<td>21%</td>
</tr>
</tbody>
</table>

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

- Total Contract Dollars Awarded
- Total Contract Dollars Awarded to HUB Contractors
- Dollars Awarded to HUB Contractors 10% GOAL

**FY2009**
$679,237 – $318,215 HUB – 47%

**FY2010**
$1,500,000 – $2,000,000 HUB – 30%

<table>
<thead>
<tr>
<th>Qtr</th>
<th>Total Contract Dollars Awarded</th>
<th>Total Contract Dollars Awarded to HUB Contractors</th>
<th>Dollars Awarded to HUB Contractors 10% GOAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Qtr FY10</td>
<td>$273,968</td>
<td>$150,312</td>
<td>55%</td>
</tr>
<tr>
<td>2nd Qtr FY10</td>
<td>$239,600</td>
<td>$0</td>
<td>0%</td>
</tr>
<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>YTD</td>
<td>$2,355,878</td>
<td>$490,336</td>
<td>21%</td>
</tr>
</tbody>
</table>
GOAL #6 – Promote Good Stewardship

Strategy 6.5 Improve Historically Underutilized Business (HUB) Participation
Objective 6.5.3 10% of Informal Contract Dollars ($30,000 and above) awarded to HUB Contractors

ACTION PLAN

• Actions Complete
  1. Participated in GC and Subcontractor “Meet & Greet” session for Informal Construction process
  2. Worked with Materials Management to resolve specific HUB issues

• Actions Planned
  1. Participate in GC and Subcontractor “Meet & Greet” session for Informal Construction process
  2. Continue –
     ▪ Encourage/Invite HUB firms to bid Informal Projects
     ▪ Work with Materials Management/Design Services to identify qualified HUBs to bid projects
     ▪ Educate business community on the process
     ▪ Provide information about Informal projects
     ▪ Community outreach efforts
Facilities Management Strategic Planning Session - Fourth Quarter FY 2010

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.

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% HUB participation projects below $30,000 - Construction- 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>QTR 1</td>
<td>$270,045</td>
<td>$0</td>
<td>0.0%</td>
</tr>
<tr>
<td>QTR 2</td>
<td>$522,917</td>
<td>$40,731</td>
<td>7.8%</td>
</tr>
<tr>
<td>QTR 3</td>
<td>$659,240</td>
<td>$47,972</td>
<td>7.3%</td>
</tr>
<tr>
<td>QTR 4</td>
<td>$1,174,445</td>
<td>$125,678</td>
<td>10.7%</td>
</tr>
<tr>
<td>FY '10 STATUS</td>
<td>$2,626,647</td>
<td>$214,381</td>
<td>8.2%</td>
</tr>
</tbody>
</table>

HUB OVERALL GOAL: 13.0%
GOAL # 6 – Promote Good Stewardship

Strategy 6.5
Objective 6.5.4

Improve Historically Underutilized Business Participation

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

ACTION PLAN

☑ Individual meetings with JOC Contractors to discuss ways to improve use of HUB firms.

6.5.4 - Actions Planned:

☐ Promote usage of HUB firms with Project Coordinators (Amand Felock).

☐ Continue Meet & Greet sessions with successful HUB firms that have been used but need greater exposure to all of Design Services.

☐ FIS to update Archibus to provide Strategic Planning reports rather than running queries.

☐ All Project Coordinators will have a new "Expectation" as part of their Performance Management and Career Development.

   Document your efforts to show the extent that you sought out HUB participation for your "Under $30,000.00" construction projects.
Facilities Management Strategic Planning Session - Fourth Quarter FY 2010

GOAL # 6 - Promote Good Stewardship

Strategy 6.5 Improve Historically Underutilized Business Participation
Objective 6.5.5 3% African American participation on informal projects below $30,000.

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

Balanced Scorecard Category: Internal Business Process

3% African American participation projects below $30,000 -Construction- 6.5.5

<table>
<thead>
<tr>
<th>QUARTERLY REVIEW</th>
<th>Value of Contracts under 30K</th>
<th>African American Contribution</th>
<th>African American Participation</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>QTR 1</td>
<td>$ 270,045</td>
<td>$ 0</td>
<td>0.0%</td>
</tr>
<tr>
<td>QTR 2</td>
<td>$ 522,917</td>
<td>$ 26,015</td>
<td>5.0%</td>
</tr>
<tr>
<td>QTR 3</td>
<td>$ 659,240</td>
<td>$ 47,972</td>
<td>7.3%</td>
</tr>
<tr>
<td>QTR 4</td>
<td>$ 1,174,445</td>
<td>$ 39,209</td>
<td>3.3%</td>
</tr>
<tr>
<td>FY '10 STATUS</td>
<td>$ 2,626,647</td>
<td>$ 113,196</td>
<td>4.3%</td>
</tr>
</tbody>
</table>

AFRICAN AMERICAN GOAL: 3.0%

4.3%
Balance Score Card

INTERNAL PROCESSES Perspective

Strategic Objectives:
- Labor Availability, Logistics Efficiency, Optimize Supply Chain, Work Request Process
- Housekeeping Processes, Improve Process Reliability
- Manage Technical Resources, Increase On-Time Delivery
- Informal Project Administration
- Master/Project Planning Process
- Capital Project Administration
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 #1 - Improve maintenance and operations of the Campus

Strategy: 1.1 Improve Labor Availability

Objective: 1.1.1 Increase “Wrench Time” by 3%

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

Goal: Greater than 66% for the year

Balanced Scorecard Category: Internal Business Process

---

Wrench Time

- 1st Qtr FY10: 77.00%
- 2nd Qtr FY10: 74.50%
- 3rd Qtr FY10: 81.50%
- 4th Qtr FY10: 80.14%
- Average FY 10 (year-to-date): 78.28%

Goal > 66% for year
GOAL #1 - Improve Facilities Operations

Strategy: 1.1 Improve Labor Availability
Objective: 1.1.1 Increase “Wrench Time” by 3%

ACTION PLAN

• Actions Complete
  1 – Continued improvement of accounting practices for time applied to WR’s. “Recorded hours” has improved from 81.2% of available hours last quarter to 81.66% of available hours this quarter.
  2 – Continued adding PMs to the PM program.

• Actions Planned
  1 – Continue development of a more extensive PM program.
  2 – Continue to stress reporting accuracy.
    a) Meet with shop supervisors and PA’s to review.
    b) Stress importance with all employees.
Facilities Management Strategic Planning Session – Fourth Quarter FY 2010

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)

Goal: Greater than 97%

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 – SDI’s automated inventory management system which automatically computes stocking levels and reorder points based on usage and replenishment time was on the entire quarter. A fill rate of 98.48% was achieved in May but fell to 93.6% in June on average volume.

  2 – Ensured all items which had backorders placed against them were turned on for replenishment. This was a contributing factor to late deliveries and lower fill rates the first quarter of FY10. This quarter replenishment was on the entire period and fill rates have improved.

• Actions Planned
  1 – Continue to let automated system control and see how it works.
Facilities Management Strategic Planning Session - Fourth Quarter FY 2010

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)

Goal: Less than 4 days

Balanced Scorecard Category: Internal Business Process

Receipt Time

<table>
<thead>
<tr>
<th>Quarter</th>
<th>1st Qtr FY10</th>
<th>2nd Qtr FY10</th>
<th>3rd Qtr FY10</th>
<th>4th Qtr FY10</th>
<th>Average FY 10 (year-to-date)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Receipt Time</td>
<td>5.67</td>
<td>6.40</td>
<td>5.39</td>
<td>8.48</td>
<td>6.48</td>
</tr>
<tr>
<td>Goal ≤ 4 days</td>
<td>4.00</td>
<td>4.00</td>
<td>4.00</td>
<td>4.00</td>
<td>4.00</td>
</tr>
</tbody>
</table>
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 improved average approval time from 7.37 hrs. in Qtr 3 to 7.32 hrs. in Qtr 4.
  2 – Orders requiring more information rose to 2.2% of orders.
  3 – Reviewed non-stock orders to determine items that should be stocked. Monthly non-stock orders averaged 292 for all of FY09. Despite tight budget; the average monthly non-stock orders this fiscal year has averaged 366 per month. The 25% increase strained SDI’s resources.
  4 - SDI has added additional resources to help with higher volumes.

• Actions Planned
  1 – Continue reviewing non-stock orders and add recurring items to stock inventory.
Facilities Management Strategic Planning Session - Fourth Quarter FY 2010

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 by 2%

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 < 62% for year.

Balanced Scorecard Category: Internal Business Process

![Graph showing Reactive Maintenance as % of All Work Requests (Includes Reactive, PM and PdM)]
GOAL #1 - Improve Facilities Operations

Strategy: 1.3  Improve Work Request Process
Objective: 1.3.1  Decrease Percentage of Reactive Work Requests by 2%

ACTION 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 - Fourth Quarter FY 2010

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
GOAL #1 - Improve Facilities Operations

Strategy: 1.3  Improve Work Request Process
Objective: 1.3.2  Decrease Non-emergency Work Request Cycle Time by 5%

ACTI ON 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.
4 - Review the manner in which data is used to calculate cycle time with FIS to ensure accuracy.

Actions Planned
1 – Emphasize M&O Policy II-16 for Timely and Accurate Handling/Processing of WRs.
Facilities Management Strategic Planning Session - Fourth Quarter FY 2010

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: Internal Business Process

APPA LEVELS

<table>
<thead>
<tr>
<th>Quarter</th>
<th>APPA Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY10-1st QTR</td>
<td>2.04</td>
</tr>
<tr>
<td>FY10-2nd QTR</td>
<td>2.08</td>
</tr>
<tr>
<td>FY10-3rd QTR</td>
<td>2.02</td>
</tr>
<tr>
<td>FY10-4th QTR</td>
<td>2.02</td>
</tr>
</tbody>
</table>

STATUS

2.04 FY10
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 - Fourth Quarter FY 2010

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 by 10%

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

Goal: Greater than 67%

Balanced Scorecard Category: Internal Business Process

Preventive Maintenance

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Qtr FY10</td>
<td>75.9%</td>
</tr>
<tr>
<td>2nd Qtr FY10</td>
<td>97.6%</td>
</tr>
<tr>
<td>3rd Qtr FY10</td>
<td>83.9%</td>
</tr>
<tr>
<td>4th Qtr FY10</td>
<td>91.1%</td>
</tr>
<tr>
<td>Average FY10</td>
<td>86.9%</td>
</tr>
</tbody>
</table>

Goal > 67%
**GOAL #1 - Improve Facilities Operations**

**Strategy:** 1.5  Improve Reliability  
**Objective:** 1.5.1  Improve Completion of Preventative Maintenance Work Requests by 10%

---

### ACTION PLAN

- **Actions Complete**
  1. Hired PM Manager.

- **Actions Planned**
  1. Continue development of PM Program.
  2. Closer monitoring of PM completions.
Facilities Management Strategic Planning Session - Fourth Quarter FY 2010

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

![Unscheduled Equipment Replacement Projects](chart)

- **Goal:** Less than 8 per year or 2 per quarter
- **Year-to-Date:**
  - 1st Qtr FY10: 4
  - 2nd Qtr FY10: 2
  - 3rd Qtr FY10: 3
  - 4th Qtr FY10: 5
  - Average FY10: 3.5

**Status:**
- Goal: < 2 per quarter

---

**Lead F. O.**
GOAL #1 - Improve Facilities Operations

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

ACTION PLAN

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

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

Note: Failures: CARC Clean Room Chiller, Transformers at Duke and West Deck, and two Air Compressors at Duke.
Facilities Management Strategic Planning Session - Fourth Quarter FY 2010

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: Internal Business Process

Unscheduled High Voltage Electrical System Outages
148,512 Building Utility Hours/Quarter Available
GOAL #1 - Improve Facilities Operations

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

ACTI ON 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 – Replaced Transformers at West Deck and repaired transformer at Duke.

• 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.
Facilities Management Strategic Planning Session - Fourth Quarter FY 2010

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:** Internal Business Process

---

**Unscheduled Fire Alarm Network Outages**

148,512 Building Alarm Hours/Quarter

Available

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Outages</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Qtr FY 10</td>
<td>26.80%</td>
</tr>
<tr>
<td>2nd Qtr FY 10</td>
<td>1.87%</td>
</tr>
<tr>
<td>3rd Qtr FY 10</td>
<td>0.98%</td>
</tr>
<tr>
<td>4th Qtr FY 10</td>
<td>1.57%</td>
</tr>
<tr>
<td>Average FY10</td>
<td>7.81%</td>
</tr>
</tbody>
</table>

Less than 10%
(14,851 Hrs.)
GOAL #1 – Improve Facilities Operations

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

ACTION 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.
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
FM 5YP
Prioritized Projects

1. Archibus Web Central Space Audit
2. Archibus – MIPS Migration to Project Management
3. Archibus – Project Management Reports – HOLD (PM)
4. Archibus - Equipment and PM Management
5. Tridium Energy Management – Phase One: Energy Reporting
6. Archibus Key Management – Phase One
7. Infrastructure Drawings and Mapping – Phase One: Archibus/ESRI Extensions Overlay configuration and Safety Equipment identification
8. Archibus Housekeeping & Recycling Management – Phase One: APPA Cleanliness Level
10. Archibus Document Management - Drawing and Manual Archive (Space & ESRI) – Over 18mo
11. Archibus Building Utility Outages Communication
12. FCAP
13. EDA
Facilities Management Strategic Planning Session - Fourth Quarter FY 2010

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: Task Completion Milestones Percentage (FY10 - FY15)

---

**Project Percentage Completion Status**

[Bar chart showing project completion status for different periods (FY10Q4, FY10Q3, FY10Q2, FY10Q1).]

- Space Audit
- ESRI: Phase 1
- Primavera
- Tridium Energy Phase 1
- EQ & PM Mgmt
- Informal Projects

---

88
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: Task Completion Milestones Percentage (FY10 - FY15)

Cumulative Project Average / Qtr within 18-Month Timeframe
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 Full AA training schedule and began AA Space Audit training.
2. Completed internal testing and began Informal Project User Testing.
4. BAS/Tridium – Place Project on hold until new BAS person (David Champion) starts.
5. New phase began in FY11 that includes additional training on Contract Management and development of a SOP and training for P6.
6. Archibus ESRI extension maps have been completed and we are waiting for data classification to release maps in Archibus to all roles.
7. EDA equipment has been purchased.
8. Key Management Phase 1 is almost completed and most views are now available.

Actions Planned:
1. Complete Space Audit training sessions for Development, Athletics and Student Services.
2. Complete SOP and go live with Informal Projects with Archibus Project Mgmt.
3. Complete Equipment Mgmt views and reports.
4. Begin Workgroups and development of EDA SOP’s.
Facilities Management Strategic Planning Session - Fourth Quarter FY 2010

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: Internal Business Process

<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>QTR 1</td>
<td>23</td>
<td>23</td>
<td>0</td>
<td>100.0%</td>
</tr>
<tr>
<td>QTR 2</td>
<td>42</td>
<td>41</td>
<td>1</td>
<td>97.6%</td>
</tr>
<tr>
<td>QTR 3</td>
<td>56</td>
<td>55</td>
<td>1</td>
<td>98.2%</td>
</tr>
<tr>
<td>QTR 4</td>
<td>52</td>
<td>51</td>
<td>1</td>
<td>98.1%</td>
</tr>
<tr>
<td>FY '10 STATUS</td>
<td>173</td>
<td>170</td>
<td>3</td>
<td>98.3%</td>
</tr>
</tbody>
</table>

GOAL: 95.0%
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:

- ✔ Updating and tracking all AA projects. Modifying project process per AA's request.
- ✔ Enhance “Campus Priority” and Project “Status Block” features.
- ✔ Meet with new SCO Electrical Inspector - discussed minor projects.

2.2.1 - Actions Planned:

- □ Continue to adopt SCO procedural steps to secure project approvals and inspections. Explore project exemptions when appropriate.
- □ FIS to assist by updating Archibus to provide Strategic Planning reports rather than running queries.
- □ Continue to provide Classroom Capacity data by developing Building Capacity standards.
Facilities Management Strategic Planning Session - Fourth Quarter FY 2010

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.

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

Balanced Scorecard Category: Internal Business Process

85% of Estimates for In-house Construction within 10% - 2.2.2

<table>
<thead>
<tr>
<th>QUARTERLY REVIEW</th>
<th>No. Of Projects Estimated</th>
<th>In-House 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>30</td>
<td>22</td>
<td>8</td>
<td>73.3%</td>
</tr>
<tr>
<td>FY '09</td>
<td>31</td>
<td>29</td>
<td>2</td>
<td>93.5%</td>
</tr>
<tr>
<td>QTR 1</td>
<td>7</td>
<td>6</td>
<td>1</td>
<td>85.7%</td>
</tr>
<tr>
<td>QTR 2</td>
<td>16</td>
<td>13</td>
<td>3</td>
<td>81.3%</td>
</tr>
<tr>
<td>QTR 3</td>
<td>14</td>
<td>13</td>
<td>1</td>
<td>92.9%</td>
</tr>
<tr>
<td>QTR 4</td>
<td>27</td>
<td>23</td>
<td>4</td>
<td>85.2%</td>
</tr>
<tr>
<td>FY '10 STATUS</td>
<td>64</td>
<td>55</td>
<td>9</td>
<td>85.9%</td>
</tr>
</tbody>
</table>

GOAL: 85.0%

FY '08 | FY '09 | QTR 1 | QTR 2 | QTR 3 | QTR 4 | FY '10 STATUS

GOAL 85.0%
FY '10 STATUS 85.9%
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:

- FIS updated Archibus to include requested columns in Priority Project lists.
- Develop new Scope & Budget form to address project costs that are either not captured in the final estimate or not a direct billing through Design Services.

2.2.2 - Actions Planned:

- Continue to assign staff review process for internal team analysis (Mac’s #2 WIG).
- Continue Project Coordinator's tracking of expended project costs.
- Use new Scope & Budget form as noted above.
GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

Strategy 2.2  Improve Informal Project Design and Construction Process
Objective 2.2.3 85% of Estimates for Contractor Construction within +/- 10%

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

Balanced Scorecard Category: Internal Business Process

<table>
<thead>
<tr>
<th>QUARTERLY REVIEW</th>
<th>Number Of Projects Estimated</th>
<th>Number of Projects within 10% of Estimate</th>
<th>Number Projects not within 10% of Estimate</th>
<th>Estimates within +/- 10%</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY '08</td>
<td>35</td>
<td>25</td>
<td>10</td>
<td>71.4%</td>
</tr>
<tr>
<td>FY '09</td>
<td>84</td>
<td>72</td>
<td>12</td>
<td>85.7%</td>
</tr>
<tr>
<td>QTR 1</td>
<td>20</td>
<td>19</td>
<td>1</td>
<td>95.0%</td>
</tr>
<tr>
<td>QTR 2</td>
<td>34</td>
<td>27</td>
<td>7</td>
<td>79.4%</td>
</tr>
<tr>
<td>QTR 3</td>
<td>53</td>
<td>46</td>
<td>7</td>
<td>86.8%</td>
</tr>
<tr>
<td>QTR 4</td>
<td>84</td>
<td>77</td>
<td>7</td>
<td>91.7%</td>
</tr>
<tr>
<td>FY '10 STATUS</td>
<td>191</td>
<td>169</td>
<td>22</td>
<td>88.5%</td>
</tr>
</tbody>
</table>

GOAL: 85.0%

FY '10 STATUS 88.5%
GOAL #2 - Successfully Adapt Existing Facilities to Meet New Requirements

Strategy 2.2 Improve Informal Project Design and Construction Process
Objective 2.2.3 80% of Estimates for Contractor Construction within 10%

ACTION PLAN

2.2.3 - Actions Completed:

☑ Renewed two of the three JOC contractors contracts.

2.2.3 - Actions Planned:

☐ Continue to implement projects that are suitable for the JOC process.
☐ Provide earlier compilation of design costs (during Scope & Budget phase).
☐ Remove road blocks or “gaps” in achieving successful projects using JOC process.
☐ Document JOC successful projects to share with fellow Project Managers.
☐ Coordinate with Team Members on usage of JOC.
☐ Coordinate with Team Members on usage of preferred contractors.
Facilities Management Strategic Planning Session - Fourth Quarter FY 2010

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)

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

Balanced Scorecard Category:  Internal Business Process

<table>
<thead>
<tr>
<th>QUARTERLY REVIEW</th>
<th>No. of In-house Projects</th>
<th>No. of In-house met Beneficial Occupancy</th>
<th>No. of In-house did not meet Delivery Date</th>
<th>Completed On Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY '08</td>
<td>30</td>
<td>22</td>
<td>8</td>
<td>73.3%</td>
</tr>
<tr>
<td>FY '09</td>
<td>31</td>
<td>28</td>
<td>3</td>
<td>90.3%</td>
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<tr>
<td>QTR 1</td>
<td>7</td>
<td>6</td>
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<td>85.7%</td>
</tr>
<tr>
<td>QTR 2</td>
<td>16</td>
<td>16</td>
<td>0</td>
<td>100.0%</td>
</tr>
<tr>
<td>QTR 3</td>
<td>14</td>
<td>13</td>
<td>1</td>
<td>92.9%</td>
</tr>
<tr>
<td>QTR 4</td>
<td>27</td>
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<tr>
<td>FY '10 STATUS</td>
<td>64</td>
<td>57</td>
<td>7</td>
<td>89.1%</td>
</tr>
</tbody>
</table>

GOAL: 90.0%  
FY'10 STATUS 89.1%
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:

☑ Develop simple construction scheduling system to be used by all coordinators.

2.2.4 - Actions Planned:

☐ Continue to establish proven steps to beneficial occupancy via departmental meetings.
☐ Expand Design Services' communications and support for projects.
☐ Post construction schedules on website to increase awareness of project timeliness.
☐ Review and suggest methods to spread out the project delivery process across the entire fiscal year.
Facilities Management Strategic Planning Session - Fourth Quarter FY 2010

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

Strategy  2.2  Improve Informal Project Design and Construction Process
Objective  2.2.5  90% of Contractor Construction Projects Meet Scheduled Beneficial Occupancy Date (BOD)

Measure: Percentage (Number of Contractor Construction Projects completed on or before delivery date divided by number of projects completed)

Balanced Scorecard Category: Internal Business Process

### Quarters Performance

<table>
<thead>
<tr>
<th>Quarter</th>
<th>No. of Contractor Projects</th>
<th>No. of Contractor met Beneficial Occupancy</th>
<th>No. of Contractor did not meet Delivery Date</th>
<th>Completed On Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY '08</td>
<td>35</td>
<td>28</td>
<td>7</td>
<td>80.0%</td>
</tr>
<tr>
<td>FY '09</td>
<td>85</td>
<td>76</td>
<td>9</td>
<td>89.4%</td>
</tr>
<tr>
<td>QTR 1</td>
<td>20</td>
<td>19</td>
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<td>95.0%</td>
</tr>
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<td>QTR 2</td>
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<tr>
<td>QTR 3</td>
<td>53</td>
<td>51</td>
<td>2</td>
<td>96.2%</td>
</tr>
<tr>
<td>QTR 4</td>
<td>84</td>
<td>73</td>
<td>11</td>
<td>86.9%</td>
</tr>
<tr>
<td>FY '10 STATUS</td>
<td>191</td>
<td>174</td>
<td>17</td>
<td>91.1%</td>
</tr>
</tbody>
</table>

**Goal:** 90.0%

**FY '10 Status:** 91.1%
GOAL #2 - Successfully Adapt Existing Facilities to Meet New Requirements

Strategy  2.2  Improve Informal Project Design and Construction Process
Objective  2.2.5  90% of Contractor Construction Projects Meet Scheduled Beneficial Occupancy Date (BOD)

ACTION PLAN

2.2.5 - Actions Completed:

2.2.5 - Actions Planned:

☐ Document all change order information at the earliest possible stage of the project.

☐ Develop better and more appropriate SCO submittal documents.

☐ Increase Project Coordinators attention to contractor's construction schedule throughout the delivery process.

☐ Review and suggest methods to spread out the project delivery process across the entire fiscal year.
Facilities Management Strategic Planning Session - Fourth Quarter FY 2010

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 2010 Benchmark is 220 projects.

Balanced Scorecard Category: Internal Business Process

<table>
<thead>
<tr>
<th>GOAL</th>
<th>Projects Completed</th>
<th>Project Dollars</th>
<th>AVG$/Project</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY'03</td>
<td>150</td>
<td>$2,060,000</td>
<td>$15,147</td>
</tr>
<tr>
<td>FY'04</td>
<td>160</td>
<td>$2,609,000</td>
<td>$16,205</td>
</tr>
<tr>
<td>FY'05</td>
<td>170</td>
<td>$3,450,000</td>
<td>$19,942</td>
</tr>
<tr>
<td>FY'06</td>
<td>180</td>
<td>$8,480,000</td>
<td>$43,711</td>
</tr>
<tr>
<td>FY'07</td>
<td>190</td>
<td>$8,875,000</td>
<td>$43,293</td>
</tr>
<tr>
<td>FY'08</td>
<td>200</td>
<td>$8,200,000</td>
<td>$43,158</td>
</tr>
<tr>
<td>FY'09</td>
<td>210</td>
<td>$7,477,000</td>
<td>$65,017</td>
</tr>
<tr>
<td>FY'10</td>
<td>220</td>
<td>$9,111,289</td>
<td>$50,062</td>
</tr>
<tr>
<td>FY'11</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>FY'12</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>FY'13</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Goal FY 2010 Status: 100%

FY'10 Projects Completed: 220
### 2010 PROJECT DATA

**Date of Data Assembly:** Monday, July 26, 2010

<table>
<thead>
<tr>
<th>Project Manager</th>
<th>Project Count 2009</th>
<th>Project Count 2010</th>
<th>Project Amount</th>
<th>AA</th>
<th>BA</th>
<th>C</th>
<th>DV</th>
<th>IA</th>
<th>SA</th>
<th>UR</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Drew Averitt</td>
<td>7</td>
<td></td>
<td>$375,816</td>
<td>$11,763</td>
<td>$108,919</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$255,134</td>
</tr>
<tr>
<td>2. John Boal</td>
<td>13</td>
<td></td>
<td>$567,924</td>
<td>$900</td>
<td>$311,264</td>
<td>$18,000</td>
<td>$237,760</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Fred Brilliante</td>
<td>2</td>
<td></td>
<td>$85,909</td>
<td></td>
<td>$85,909</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Steve Burt</td>
<td>8</td>
<td></td>
<td>$326,149</td>
<td>$324,706</td>
<td>$1,443</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Essa Dossary</td>
<td>28</td>
<td></td>
<td>$740,846</td>
<td>$251,846</td>
<td>$182,816</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. Marisa Elston</td>
<td>12</td>
<td></td>
<td>$181,954</td>
<td>$44,057</td>
<td>$131,202</td>
<td></td>
<td></td>
<td></td>
<td>$6,695</td>
<td></td>
</tr>
<tr>
<td>7. Amanda Felock</td>
<td>26</td>
<td></td>
<td>$1,536,138</td>
<td>$756,357</td>
<td>$9,806</td>
<td>$702,463</td>
<td>$306,184</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8. Sam Hanna</td>
<td>11</td>
<td></td>
<td>$675,353</td>
<td>$212,215</td>
<td>$312,899</td>
<td></td>
<td></td>
<td></td>
<td>$150,239</td>
<td></td>
</tr>
<tr>
<td>9. Cheryl Lansford</td>
<td>17</td>
<td></td>
<td>$2,643,068</td>
<td>$932,926</td>
<td>$139,537</td>
<td></td>
<td></td>
<td>$1,570,605</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10. David Love</td>
<td>1</td>
<td></td>
<td>$14,935</td>
<td></td>
<td>$14,935</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11. Jeff Ross</td>
<td>43</td>
<td></td>
<td>$1,670,097</td>
<td>$384,828</td>
<td>$1,239,409</td>
<td>$18,620</td>
<td>$78,021</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12. Steve Terry</td>
<td>14</td>
<td></td>
<td>$293,100</td>
<td>$14,932</td>
<td>$262,812</td>
<td></td>
<td></td>
<td>$7,067</td>
<td>$8,290</td>
<td></td>
</tr>
</tbody>
</table>

**A.** Total Projects

| 115 | 182 |

**B.** Project Dollar Volume - 2010

$9,111,289

**C.** Project Average

$50,062

**D.** Project Dollar Volume - 2009

$7,477,000

**E.** Project Dollar Increase - 2010

$1,634,289

**G.** Project Volume Increase

21.9%
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

☑ Review Priority 0 projects with customers alerting them that Design Services is prepared to address their project needs this fiscal year.

2.2.6 - Actions Planned:

☐ Review FY’09 projects that went On-Hold for scheduled completion as projects are reactivated to increase our overall counts.

☐ Review and suggest methods to spread out the project delivery process across the entire fiscal year.
Facilities Management Strategic Planning Session - Fourth Quarter FY 2010

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: % through the R & R process

Balanced Scorecard Category: Internal Business Process
"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
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 - Fourth Quarter FY 2010

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 08/09</td>
<td>9</td>
<td>3</td>
<td>4</td>
<td>33.30%</td>
</tr>
<tr>
<td>Summary 09/10</td>
<td>10</td>
<td>9</td>
<td>3</td>
<td>75.0%</td>
</tr>
<tr>
<td>1st Qtr. 09/10</td>
<td>5</td>
<td>3</td>
<td>1</td>
<td>60.0%</td>
</tr>
<tr>
<td>2nd Qtr. 09/10</td>
<td>5</td>
<td>2</td>
<td>0</td>
<td>40.0%</td>
</tr>
<tr>
<td>3rd Qtr. 09/10</td>
<td>5</td>
<td>4</td>
<td>1</td>
<td>80.0%</td>
</tr>
<tr>
<td>4th Qtr. 09/10</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>0.0%</td>
</tr>
</tbody>
</table>

Results for 4th Quarter is 0%
Results for Fiscal Year is 45%
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. Fee negotiations for Student Activity Center offices completed.

• Actions Planned
  – 2. Monitor fees against fee curves (Georgia, Florida, etc.) and similar projects at other campuses.
  – 3. Have project managers participate.
Facilities Management Strategic Planning Session - Fourth Quarter FY 2010

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 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 08/09</td>
<td>4</td>
<td>0</td>
<td>100.00%</td>
</tr>
<tr>
<td>Summary 09/10</td>
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<td>5</td>
<td>63.00%</td>
</tr>
<tr>
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<td>0.0%</td>
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<td>2nd Qtr. 09/10</td>
<td>2</td>
<td>2</td>
<td>0.0%</td>
</tr>
<tr>
<td>3rd Qtr. 09/10</td>
<td>4</td>
<td>2</td>
<td>50.0%</td>
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<tr>
<td>4th Qtr. 09/10</td>
<td>2</td>
<td>0</td>
<td>100.00%</td>
</tr>
<tr>
<td>FY10</td>
<td>9</td>
<td>5</td>
<td>55.6%</td>
</tr>
</tbody>
</table>

Results for 4th Quarter is 100%  
Results for Fiscal Year is 55.6%
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. Obtained SCO approval for Prospector Phase II & bidding completed
  – 2. Residence Halls Fire Sprinklers (Holshouser, Cedar, Hickory, Sycamore) approved by SCO & bidding completed
• Actions Planned
  – 1. Complete EPIC Trade packages (In review at SCO)
  – 2. Complete RUP & EPIC road plans (approvals)
  – 3. Complete Motorsports II
  – 5. Monitor & review project schedule as provided from planning
Facilities Management Strategic Planning Session - Fourth FY 2010

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>
</tr>
</thead>
<tbody>
<tr>
<td>Alumni</td>
<td>$1,100,000.00</td>
<td>$701,400.00</td>
<td>$701,400.00</td>
</tr>
<tr>
<td>EPIC</td>
<td>$6,021,000.00</td>
<td>$4,476,635.00</td>
<td>$6,530,370.00</td>
</tr>
<tr>
<td>Football/Sports</td>
<td>$3,950,000.00</td>
<td>$2,739,800.00</td>
<td>$3,224,472.00</td>
</tr>
<tr>
<td>Motorsports II</td>
<td>$399,000.00</td>
<td>$303,000.00</td>
<td>$303,700.00</td>
</tr>
<tr>
<td>Outdoor Student Rec Fac</td>
<td>$336,575.00</td>
<td>$258,733.00</td>
<td>$273,552.00</td>
</tr>
<tr>
<td>Parking Deck I</td>
<td>$1,701,000.00</td>
<td>$1,044,000.00</td>
<td>$802,869.00</td>
</tr>
<tr>
<td>Prospector Phase II</td>
<td>$418,770.00</td>
<td>$295,500.00</td>
<td>$455,500.00</td>
</tr>
<tr>
<td>Residence Hall Sprinkler Hols.</td>
<td>$265,818.00</td>
<td>$202,500.00</td>
<td>$202,500.00</td>
</tr>
<tr>
<td>Residence Hall Sprinkler C, H, S</td>
<td>$132,720.00</td>
<td>$109,836.00</td>
<td>$109,836.00</td>
</tr>
<tr>
<td>Tennis Courts</td>
<td>$292,972.00</td>
<td>$275,000.00</td>
<td>$275,000.00</td>
</tr>
</tbody>
</table>

71% completed within design budgeted fee

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

ACTION PLAN

• Actions Completed
  – 1. New Tennis Courts design completed, now in bidding
  – 2. Parking Deck H design completed, now in bidding
  – Alumni Parking design completed, now in construction

• Actions Planned
  – 1. Keep Parking Deck I in budget
  – 2. Keep Motorsports II in budget
  – 3. Keep PORTAL in budget
  – 4. Keep Prospector Renovation II in budget
  – 6. Negotiate fair fees for Heckenbleikner Lake Dam repair
Facilities Management Strategic Planning Session - Fourth FY 2010

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: Internal Business Process

<table>
<thead>
<tr>
<th>STRATEGIC REVIEW by Fiscal Year (July-June)</th>
<th># completed on schedule</th>
<th>not completed on schedule</th>
<th>% completed on time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summary 08/09</td>
<td>4</td>
<td>2</td>
<td>50.0%</td>
</tr>
<tr>
<td>Summary 09/10</td>
<td>6</td>
<td>0</td>
<td>100.0%</td>
</tr>
<tr>
<td>1st Qtr. 09/10</td>
<td>4</td>
<td>0</td>
<td>100.0%</td>
</tr>
<tr>
<td>2nd Qtr. 09/10</td>
<td>0</td>
<td>0</td>
<td>0.0%</td>
</tr>
<tr>
<td>3rd Qtr. 09/10</td>
<td>0</td>
<td>0</td>
<td>0.0%</td>
</tr>
<tr>
<td>4th Qtr. 09/10</td>
<td>2</td>
<td>0</td>
<td>100.0%</td>
</tr>
</tbody>
</table>

Objective for 4th Quarter is 100%
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
  – 1.

Actions Planned
  – 1. Control change orders
  – 2. Limit customer requested change orders
  – 3. Limit additional scope request at 50% level from customer
  – 4. Use CM@Risk where appropriate
  – 5. Focus on summer projects – Residence Hall Sprinklers, Pedestrian Bridge, Cameron Blvd. Resurfacing, Mary Alexander Resurfacing, Boiler Replacement
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. Closed out Student Union

• Actions Planned
  – 1. Insure we engage CM on constructive criticism early in the process
  – 2. Insure we get delivery of items in the RFP
  – 3. Engage CM’s closer to SD’s
  – 4. Gauge CM’s performance on final contingency and change order rates
Balance Score Card

Learning & Growth Perspective

Strategic Objectives:
- Develop high quality staff
- Retain high quality staff
- Develop positive culture
"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 #5

Develop a Valued, Well-trained, Motivated and Diverse Workforce
Facilities Management Strategic Planning Session - Fourth Quarter FY 2010

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

Fiscal 2010 Results:

65 Nonexempt Hires:
Average # /days: 115

Goal: 80 days
Facilities Management Strategic Planning Session - Fourth Quarter FY 2010

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 Exempt (Salaried) Vacancies

Fiscal 2010 Results:
1 Exempt Hires:
Average # /days: 389

Goal: 120 days
Facilities Management Strategic Planning Session - Fourth Quarter FY 2010

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

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**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. Meet with FIS to develop plan
     b. Input data
     c. Report development
Facilities Management Strategic Planning Session - Fourth Quarter FY 2010

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>2</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Q2</td>
<td>23</td>
<td>6</td>
<td>0</td>
</tr>
<tr>
<td>Q3</td>
<td>27</td>
<td>24</td>
<td>0</td>
</tr>
<tr>
<td>Q4</td>
<td>14</td>
<td>9</td>
<td>1</td>
</tr>
</tbody>
</table>

**Fiscal 2010 Results:**

- **Goal:** 100%
- **Actual:** 32%

**Status:**

<table>
<thead>
<tr>
<th>Q1</th>
<th>Q2</th>
<th>Q3</th>
<th>Q4</th>
</tr>
</thead>
<tbody>
<tr>
<td>0%</td>
<td>26%</td>
<td>88%</td>
<td>71%</td>
</tr>
</tbody>
</table>
Facilities Management Strategic Planning Session - Fourth Quarter FY 2010

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 - Fourth Quarter FY 2010

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 10
Training Hours for Supervisors & Managers by Quarter

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

Fiscal 2010 Results:
Goal
1720 hrs
Actual
1,376 hrs
(80%)
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.

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 - Fourth Quarter FY 2010

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

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**FY 10**

**Training Hours by Quarter** *(non-management)*

- **Q1:** 316.5 hrs
- **Q2:** 419 hrs
- **Q3:** 716 hrs
- **Q4:** 2,159.5 hrs

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

**Fiscal 2010 Results:**
- **Goal:** 6,460 hrs
- **Actual:** 2,823 hrs (44%)

**STATUS**
### 09~10 YTD Training Hours - Percentage of Target

<table>
<thead>
<tr>
<th>Unit/Zone</th>
<th>YTD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Design Services</td>
<td>20%</td>
</tr>
<tr>
<td>Grounds</td>
<td>22%</td>
</tr>
<tr>
<td>FIS</td>
<td>24%</td>
</tr>
<tr>
<td>Steam Plant</td>
<td>26%</td>
</tr>
<tr>
<td>Zone 7</td>
<td>31%</td>
</tr>
<tr>
<td>Capital Projects</td>
<td>33%</td>
</tr>
<tr>
<td>Housekeeping *</td>
<td>41%</td>
</tr>
<tr>
<td>Lock Shop</td>
<td>41%</td>
</tr>
<tr>
<td>Zone 5</td>
<td>43%</td>
</tr>
<tr>
<td>High Voltage &amp; Fire Alarms</td>
<td>47%</td>
</tr>
<tr>
<td>Zone 1</td>
<td>47%</td>
</tr>
<tr>
<td>Zone 6</td>
<td>51%</td>
</tr>
<tr>
<td>Zone 2</td>
<td>65%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Unit/Zone</th>
<th>YTD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facilities Operations Admin</td>
<td>66%</td>
</tr>
<tr>
<td>Zone 4</td>
<td>92%</td>
</tr>
<tr>
<td>Central Operations</td>
<td>95%</td>
</tr>
<tr>
<td>Auto</td>
<td>99%</td>
</tr>
<tr>
<td>Recycling *</td>
<td>114%</td>
</tr>
<tr>
<td>AVC</td>
<td>125%</td>
</tr>
<tr>
<td>Planning</td>
<td>129%</td>
</tr>
<tr>
<td>Business Office</td>
<td>136%</td>
</tr>
</tbody>
</table>

* HSKP & Recycling combined = 48%
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. Continue development of training matrix for trades positions
  2. PC skills training for infrequent users in preparation for Web Time entry
  3. Implementation of new HRIS for FM HR
Facilities Management Strategic Planning Session - Fourth Quarter FY 2010

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

Fiscal 2010 Results:
- Goal < 14%
- Actual 2%

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
Facilities Management Strategic Planning Session - Fourth Quarter FY 2010

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

![Annual Employee Overall Job Satisfaction Chart]

- FY 2008: 84%
- FY 2009: 81.5%
- FY 2010: 90%

Goal = 85%
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