Strategic Planning Session
Fourth Quarter – Fiscal Year 2011
July 27, 2011

...Creating a Campus of Distinction
GOAL #1

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

-- Harold Geneen, industrialist

Improve Maintenance and Operation on the Campus
GOAL #2

Successfully Adapt Existing Facilities to Meet New Requirements

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

-- Stephen Covey, Author and Speaker
GOAL #3

Deliver New Facilities that Support the University’s Mission

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

-- Michelangelo, Artist
GOAL #4

Perfect a Customer Focused Organization

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

- Theo Michelson, State Farm Insurance
GOAL #5

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

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

-- Calvin Coolidge, 30th U.S. president
GOAL #6

Promote Good Stewardship

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

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

CUSTOMER Perspective

Strategic Objectives:
- Work Request Process, Housekeeping Processes,
- Improve Process Reliability, Increase On-Time Delivery,
- Informal Project Administration,
- Enhance Customer Satisfaction
Facilities Management Strategic Planning Session - Fourth Quarter FY 2011

GOAL #1 - Improve maintenance and operations of the Campus

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

Measure: Percentage (Number of reactive work requests divided by total number of work requests including PM and predictive work requests) (APPA Benchmark)
Goal: Percentage to average < 58% for year.

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

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

ACTION PLAN

• Actions Complete
  1 – Reviewed Chillers, and Fire pump PM’s – added missing PMs.

• Actions Planned
  1 – Continue to build PM program to cover all equipment.
    a) 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 2011

GOAL #1 - Improve maintenance and operations of the Campus

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

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

Goal: Less than 719 quarterly average for the year

Balanced Scorecard Category: Internal Business Process

Archibus Report
In error
FIS Contacted
GOAL #1 - Improve Facilities Operations

Strategy: 1.3
Objective: 1.3.2

Improve Work Request Process
Decrease Non-emergency Work Request Cycle Time by 5%

ACTION PLAN

Actions Complete
1 – Continued emphasis on over 14 day and 30 day reports by supervisors and managers.
2 – Continued review of unassigned WR’s by supervisors and managers.
3 – Continued review of PM and other work assignments and completions with technicians.
4 - Review the manner in which data is used to calculate cycle time with FIS to ensure accuracy.

Actions Planned
1 – Emphasize Facilities Operations OP-16 Timely and Accurate Handling/Processing of WRs.
Facilities Management Strategic Planning Session – Fourth Quarter FY 2011

GOAL #1 - Improve maintenance and operations of the Campus

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

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

Goal: Less than .0069 for year.

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

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

ACTION PLAN

• Actions Complete
  1 – Completed PM’s as scheduled.
  2 – Completed first half of thermal scanning.

• 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.
Facilities Management Strategic Planning Session - Fourth Quarter FY 2011

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

Quarterly Reimbursable Labor $
GOAL #1 – Improve Facilities Operations

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

ACTI ON PLAN

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

Actions Planned
1 – Continue working with Simplex to bring the last buildings online with the network.
Facilities Management Strategic Planning Session - 4th Quarter FY 2011

GOAL #1 – Improve Maintenance and Operations of the Campus

<table>
<thead>
<tr>
<th>Strategy:</th>
<th>1.4</th>
<th>Improve Housekeeping Processes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Objective:</td>
<td>1.4.1</td>
<td>Achieve APPA Level 2 in 98% of Buildings</td>
</tr>
</tbody>
</table>

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>FY11-1st QTR</th>
<th>FY11-2nd QTR</th>
<th>FY11-3rd QTR</th>
<th>FY11-4th QTR</th>
<th>FYTD</th>
</tr>
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<tr>
<td>1.97</td>
<td>2.05</td>
<td>1.97</td>
<td>2.06</td>
<td>2.01</td>
</tr>
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</table>

STATUS
GOAL #1 - Improve Maintenance and Operations

**Strategy:** 1.4  
**Objective:** 1.4.1

**Improve Housekeeping Processes**

**Achieve APPA Level 2 in 98% of Buildings**

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**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 2011

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

### QUARTERLY REVIEW

<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>
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<tbody>
<tr>
<td>FY '08</td>
<td>65</td>
<td>55</td>
<td>10</td>
<td>84.6%</td>
</tr>
<tr>
<td>FY '09</td>
<td>115</td>
<td>112</td>
<td>3</td>
<td>97.4%</td>
</tr>
<tr>
<td>FY '10</td>
<td>173</td>
<td>170</td>
<td>3</td>
<td>98.3%</td>
</tr>
<tr>
<td>QTR 1</td>
<td>49</td>
<td>49</td>
<td>0</td>
<td>100.0%</td>
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<td>89</td>
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<td>QTR 4</td>
<td>98</td>
<td>97</td>
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<tr>
<td>FY '11 STATUS</td>
<td>300</td>
<td>298</td>
<td>2</td>
<td>99.3%</td>
</tr>
</tbody>
</table>

FY '11 STATUS: 99.3%
GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

Strategic Plan:

Objective 2.2.1
95% of Projects Designed on Time

ACTION PLAN

2.2.1 - Actions Completed:

2.2.1 - Actions Planned:

☐ New “Wildly Important Goal” - handout guiding Customers through Design Services' project processes and Archibus.

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

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

☐ Embrace new SCO procedural steps and secure project approvals and inspections - on going.
Facilities Management Strategic Planning Session - Fourth Quarter FY 2011

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

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

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

Balanced Scorecard Category: Internal Business Process

<table>
<thead>
<tr>
<th>QUARTERLY REVIEW</th>
<th>No. Of Projects Estimated</th>
<th>Projects Estimated within +/- 10%</th>
<th>Projects Not Estimated within +/- 10%</th>
<th>Estimates within +/- 10%</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY'08</td>
<td>65</td>
<td>47</td>
<td>18</td>
<td>72.3%</td>
</tr>
<tr>
<td>FY'09</td>
<td>115</td>
<td>101</td>
<td>14</td>
<td>87.8%</td>
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<tr>
<td>FY'10</td>
<td>255</td>
<td>244</td>
<td>11</td>
<td>95.7%</td>
</tr>
<tr>
<td>QTR 1</td>
<td>31</td>
<td>30</td>
<td>1</td>
<td>96.8%</td>
</tr>
<tr>
<td>QTR 2</td>
<td>36</td>
<td>32</td>
<td>4</td>
<td>88.9%</td>
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<td>175</td>
<td>169</td>
<td>6</td>
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<tr>
<td>FY '11 STATUS</td>
<td>297</td>
<td>284</td>
<td>13</td>
<td>95.6%</td>
</tr>
</tbody>
</table>
GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

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

ACTION PLAN

2.2.2 - Actions Completed:

2.2.2 - Actions Planned:

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

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

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

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

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

Balanced Scorecard Category: Internal Business Process
GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

Strategy 2.2
Objective 2.2.4

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

ACTION PLAN

2.2.4 - Actions Completed:

2.2.4 - Actions Planned:

☐ Project schedules from Scope & Budget, Design and Construction through

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

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

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

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

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

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

**Measure:** The 2008 Benchmark is 200 projects.

**Balanced Scorecard Category:** Internal Business Process
Facilities Management Strategic Planning Session - Fourth Quarter FY 2011

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

**Strategy** 3.4 Improve Administration of the Capital Construction Process

**Objective** 3.4.1 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 FY-09</td>
<td>4</td>
<td>2</td>
<td>50.0%</td>
</tr>
<tr>
<td>Summary FY-10</td>
<td>6</td>
<td>0</td>
<td>100.0%</td>
</tr>
<tr>
<td>Summary FY-11</td>
<td>7</td>
<td>1</td>
<td>87.5%</td>
</tr>
<tr>
<td>1st Qtr. FY-11</td>
<td>4</td>
<td>0</td>
<td>100.0%</td>
</tr>
<tr>
<td>2nd Qtr. FY-11</td>
<td>0</td>
<td>1</td>
<td>0.0%</td>
</tr>
<tr>
<td>3rd Qtr. FY-11</td>
<td>1</td>
<td>0</td>
<td>100.0%</td>
</tr>
<tr>
<td>4th Qtr. FY-11</td>
<td>2</td>
<td>0</td>
<td>100.0%</td>
</tr>
</tbody>
</table>

Objective for 4th Quarter is 100%
Year to date is 87.5%
GOAL #4 - Perfect a Customer Focused Organization

**Strategy 4.1** Continually Improve Customer Service/Satisfaction

**Objective 4.1.1** Achieve Overall FM Customer Satisfaction of 85%

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

**Balanced Scorecard Category:** Customer Perspective

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**Overall Satisfaction with Facilities Management Services**

![Graph showing overall satisfaction with Facilities Management services from FY 2008 to FY 2010.]

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

Goal = 85%
GOAL #4 - Perfect a Customer Focused Organization

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

ACTION PLAN

- Actions Complete

- Actions Planned
Facilities Management Strategic Planning Session - 4th Quarter FY 2011

GOAL #4 - Perfect a Customer Focused Organization

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

Measure: Annual Customer Survey Results

Balanced Scorecard Category: Customer Perspective

Unit Customer Satisfaction Survey Rating Comparison (%)

Goal = 85%

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

STATUS
GOAL #4 - Perfect a Customer Focused Organization

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

ACTION PLAN

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

GOAL #4 - Perfect a Customer Focused Organization

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

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

Goal: Less than 133 per quarter annual average

Balanced Scorecard Category: Customer Perspective

![Hot and Cold Calls Chart]
GOAL #4 - Perfect a Customer Focused Organization

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

ACTION PLAN

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

• Actions Planned
  1 – Stay abreast of ESCO contract and ensure comfort is not sacrificed for energy.
  2 – See what ESCO’s might recommend that would improve comfort and seek wider application.
Housekeeping Work Request Customer Satisfaction

Facilities Management Strategic Planning Session - 4th Quarter FY 2011

GOAL #4 - Perfect a Customer Focused Organization

Strategy 4.1 Continually Improve Customer Service/Satisfaction

BONUS SLIDE
Facilities Management Strategic Planning Session - Fourth Quarter FY 2011

GOAL #4 - Perfect a Customer Focused Organization

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

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

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

**Balanced Scorecard Category:**  Customer Perspective

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

<table>
<thead>
<tr>
<th>QUARTERLY SURVEY</th>
<th>Number of Projects Surveyed</th>
<th>Very Satisfied</th>
<th>Satisfied 4+</th>
<th>Somewhat Satisfied 3+</th>
<th>Neutral 2+</th>
<th>Somewhat Dissatisfied 1+</th>
<th>Unsatified 0+</th>
<th>Percent Satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY '08</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</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>FY '10</td>
<td>30</td>
<td>18</td>
<td>5</td>
<td>0</td>
<td>6</td>
<td>1</td>
<td>0</td>
<td>76.7%</td>
</tr>
<tr>
<td>QTR 1</td>
<td>4</td>
<td>3</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>100.0%</td>
</tr>
<tr>
<td>QTR 2</td>
<td>11</td>
<td>8</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>90.9%</td>
</tr>
<tr>
<td>QTR 3</td>
<td>Surveys not recorded in Archibus during 3rd Quarter</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>#VALUE!</td>
</tr>
<tr>
<td>QTR 4</td>
<td>18</td>
<td>13</td>
<td>3</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>88.9%</td>
</tr>
<tr>
<td>FY '11 STATUS</td>
<td>33</td>
<td>24</td>
<td>6</td>
<td>2</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>90.9%</td>
</tr>
</tbody>
</table>

FY '10 STATUS: 90.0%

FY '11 STATUS: 90.9%
GOAL #4 - Perfect a Customer Focused Organization

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

ACTION PLAN

4.1.1 - Actions Completed:

4.1.1 - Actions Planned:

☐ Review Customer Satisfaction Survey responses and implement appropriate
Facilities Management Strategic Planning Session – Third Quarter FY 2011

GOAL #4 - Perfect a Customer Focused Organization

**Strategy** 4.1  Continually Improve Customer Service/Satisfaction

**Objective** 4.1.5  85% of Capital Project Customers Satisfied or Very Satisfied at the end of the design phase

**Measure:**  Results from Interactive Web-based Customer Questionnaire.

**Balanced Scorecard Category:**  Customer Perspective

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

No data is a result of customer not answering questionnaire

**Objective for 4th Quarter is not measured**

Year to date is 100%
GOAL #4 - Perfect a Customer Focused Organization

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

ACTION PLAN

• Actions Complete
  – 1.

• Actions Planned
  – 1. Need to submit satisfaction survey to customers on:
    Parking Deck I and Football Complex
Facilities Management Strategic Planning Session - Fourth Quarter FY 2011

GOAL #4 - Perfect a Customer Focused Organization

**Strategy** 4.1 Continually Improve Customer Service/Satisfaction

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

**Measure:** Results from Interactive Web-based Customer Questionnaire.

**Balanced Scorecard Category:** Customer Perspective

<table>
<thead>
<tr>
<th>STRATEGIC REVIEW by Fiscal Year (July - June)</th>
<th>No. of Questionnaire Customers</th>
<th>Satisfied with Customer Service</th>
<th>Not Satisfied with Customer Service</th>
<th>% of Satisfied Customers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summary FY-09</td>
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<td>5</td>
<td>1</td>
<td>0</td>
<td>20.0%</td>
</tr>
<tr>
<td>Summary FY-11</td>
<td>5</td>
<td>1</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>1st Qtr. FY-11</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.0%</td>
</tr>
<tr>
<td>2nd Qtr. FY-11</td>
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<td>0</td>
<td>0</td>
<td>0.0%</td>
</tr>
<tr>
<td>3rd Qtr. FY-11</td>
<td>4</td>
<td>1</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>4th Qtr. FY-11</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.0%</td>
</tr>
</tbody>
</table>

Objective for 4th Quarter is not measured
Year to date is 100%
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.

- Actions Planned
  - 1. Need to submit satisfaction survey to customers on:
    SAC Office Renovations
### DISCUSSION

**CUSTOMER PERSPECTIVE**

<table>
<thead>
<tr>
<th>Perspective</th>
<th>Strategic Objective</th>
<th>Goal</th>
<th>Lag Measures/Lead Measures</th>
<th>Target</th>
<th>Actual</th>
<th>1st Quarter</th>
<th>2nd Quarter</th>
<th>3rd Quarter</th>
<th>4th Quarter</th>
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</thead>
<tbody>
<tr>
<td>Customer</td>
<td>Work Request Process</td>
<td>1.3.1</td>
<td>Reactive Maintenance work requests</td>
<td>&lt;58%</td>
<td></td>
<td>Yellow</td>
<td>Yellow</td>
<td>Yellow</td>
<td>Yellow</td>
</tr>
<tr>
<td>Customer</td>
<td></td>
<td>1.3.2</td>
<td>Decrease Work Request Cycle Time by 5%</td>
<td>&lt;300 hrs</td>
<td></td>
<td>Yellow</td>
<td>Yellow</td>
<td>Yellow</td>
<td>Yellow</td>
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<tr>
<td>Customer</td>
<td>Housekeeping Processes</td>
<td>1.4.1</td>
<td>Achieve APPA Level 2 in 98% of Buildings</td>
<td>98%</td>
<td>98%</td>
<td>Yellow</td>
<td>Yellow</td>
<td>Yellow</td>
<td>Yellow</td>
</tr>
<tr>
<td>Customer</td>
<td>Improve Process Reliability</td>
<td>1.5.3</td>
<td>Reduce Unscheduled HV outages by 10%</td>
<td>&lt;=0.3%</td>
<td></td>
<td>Yellow</td>
<td>Yellow</td>
<td>Yellow</td>
<td>Yellow</td>
</tr>
<tr>
<td>Customer</td>
<td></td>
<td>1.5.4</td>
<td>Reduce Unscheduled FA Network Outages by 10%</td>
<td>&lt;=3%</td>
<td></td>
<td>Yellow</td>
<td>Yellow</td>
<td>Yellow</td>
<td>Yellow</td>
</tr>
<tr>
<td>Customer</td>
<td>Increase on-time delivery</td>
<td>2.2.1</td>
<td>95% of Projects Designed on Time</td>
<td>95%</td>
<td>99.3%</td>
<td>Yellow</td>
<td>Yellow</td>
<td>Yellow</td>
<td>Yellow</td>
</tr>
<tr>
<td>Customer</td>
<td>Informal Project Administration</td>
<td>2.2.2</td>
<td>85% of Estimates for All Construction within +/- 10%</td>
<td>85% w/in 10% actuals</td>
<td>95.6%</td>
<td>Yellow</td>
<td>Yellow</td>
<td>Yellow</td>
<td>Yellow</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2.2.3</td>
<td>Combined with 2.2.2</td>
<td></td>
<td></td>
<td>Yellow</td>
<td>Yellow</td>
<td>Yellow</td>
<td>Yellow</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2.2.4</td>
<td>All IP construction meets BOD</td>
<td>90%</td>
<td>97.3%</td>
<td>Yellow</td>
<td>Yellow</td>
<td>Yellow</td>
<td>Yellow</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2.2.5</td>
<td>Combined with 2.2.4</td>
<td></td>
<td></td>
<td>Yellow</td>
<td>Yellow</td>
<td>Yellow</td>
<td>Yellow</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2.2.6</td>
<td>Increase Project Volume by 10 proj/year</td>
<td>200 = bchmk; goal 210</td>
<td>107.0%</td>
<td>Annual</td>
<td>Annual</td>
<td>Annual</td>
<td>Annual</td>
</tr>
<tr>
<td></td>
<td></td>
<td>3.4.1</td>
<td>90% Cap Construction Projects on Schedule</td>
<td>90%</td>
<td>87.5%</td>
<td>Annual</td>
<td>Annual</td>
<td>Annual</td>
<td>Annual</td>
</tr>
<tr>
<td></td>
<td>Enhance customer satisfaction</td>
<td>4.1.1</td>
<td>Improve: Overall satisfaction rating</td>
<td>85%</td>
<td>No data</td>
<td>Annual</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>4.1.2</td>
<td>All FM Units Achieve Customer Satisfaction of 85%</td>
<td>85%</td>
<td>No data</td>
<td>Annual</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>4.1.3</td>
<td>Reduce: Maintenance &amp; Ops 1 hot/cold calls</td>
<td>-15% or &lt;133</td>
<td>90.9%</td>
<td>Red</td>
<td>Yellow</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>4.1.4</td>
<td>Improve: Formal Projects rating (sat./very sat.)</td>
<td>90%</td>
<td></td>
<td>Red</td>
<td>Yellow</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>4.1.5</td>
<td>Improve: Capital Projects rating (sat./very sat.) - design</td>
<td>85%</td>
<td>100%</td>
<td>Yellow</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>4.1.6</td>
<td>Improve: Capital Projects rating (sat./very sat.) - constr</td>
<td>85%</td>
<td>100%</td>
<td>Yellow</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>NEW</td>
<td></td>
<td>All measures positive on customer sat survey</td>
<td>&lt;2% S Dis; &lt; 5% Dis or Neu</td>
<td></td>
<td>Yellow</td>
<td>Yellow</td>
<td>Yellow</td>
<td>Yellow</td>
</tr>
</tbody>
</table>

*NEW* All measures positive on customer sat survey
Balance Score Card

FINANCIAL Perspective

Strategic Objectives:
Manage Budget, Maximize Revenue Stream
Promote Fiscal Responsibility
Sustainable Practices
Conserve Natural Resources
Improve Employee Safety
Improve HUB Participation
Facilities Management Strategic Planning Session – 4th Quarter FY 2011

GOAL #6 – Promote Good Stewardship

**Strategy**  6.1  Promote Fiscal Responsibility

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

**Measure:**  Main Operating Fund Variance Report

**Balanced Scorecard Category:**  Financial Perspective

---

**FACILITIES MANAGEMENT OPERATIONS thru June 30, 2011 FINAL**

<table>
<thead>
<tr>
<th>ACCOUNT DESCRIPTION</th>
<th>2010-11 Budget</th>
<th>% of TOTAL BUDGET</th>
<th>YTD ACTIVITY</th>
<th>ENCUMBRANCES</th>
<th>TOTAL EXPENDITURES</th>
<th>REMAINING BALANCE</th>
</tr>
</thead>
<tbody>
<tr>
<td>STUDENT AND TEMPORARY WAGES</td>
<td>$36,205</td>
<td>1%</td>
<td>$36,205</td>
<td>-</td>
<td>$36,205</td>
<td></td>
</tr>
<tr>
<td>PERSONAL SERVICE CONTRACTS</td>
<td>$159,716</td>
<td>5%</td>
<td>$156,406</td>
<td>$3,310</td>
<td>$159,716</td>
<td>$0</td>
</tr>
<tr>
<td>CORPORATE SERVICE CONTRACTS (Srv Agr)</td>
<td>$687,173</td>
<td>22%</td>
<td>$686,876</td>
<td>$298</td>
<td>$687,173</td>
<td>$0</td>
</tr>
<tr>
<td>OTHER ADMINISTRATIVE EXPENSES</td>
<td>$47,699</td>
<td>1%</td>
<td>$47,249</td>
<td>$450</td>
<td>$47,699</td>
<td></td>
</tr>
<tr>
<td>DOMESTIC TRAVEL/TRAINING</td>
<td>$84,873</td>
<td>3%</td>
<td>$84,873</td>
<td>-</td>
<td>$84,873</td>
<td></td>
</tr>
<tr>
<td>FIXED PURCHASED SERVICES (Maint Agr)</td>
<td>$258,828</td>
<td>8%</td>
<td>$258,597</td>
<td>$231</td>
<td>$258,828</td>
<td></td>
</tr>
<tr>
<td>OTHER PURCHASED SERVICES</td>
<td>$446,308</td>
<td>14%</td>
<td>$433,077</td>
<td>$13,231</td>
<td>$446,308</td>
<td></td>
</tr>
<tr>
<td>SUPPLIES</td>
<td>$1,253,600</td>
<td>39%</td>
<td>$1,217,317</td>
<td>$36,284</td>
<td>$1,253,600</td>
<td>$0</td>
</tr>
<tr>
<td>EQUIPMENT</td>
<td>$141,543</td>
<td>4%</td>
<td>$139,982</td>
<td>$1,561</td>
<td>$141,543</td>
<td>$0</td>
</tr>
<tr>
<td>CAPITAL OUTLAY</td>
<td>$3,677</td>
<td>0%</td>
<td>$3,677</td>
<td>-</td>
<td>$3,677</td>
<td></td>
</tr>
<tr>
<td>FIXED CHARGES</td>
<td>$24,264</td>
<td>1%</td>
<td>$24,264</td>
<td>-</td>
<td>$24,264</td>
<td></td>
</tr>
<tr>
<td>RECYCLING</td>
<td>$40,412</td>
<td>1%</td>
<td>$37,329</td>
<td>$2,888</td>
<td>$40,227</td>
<td>$185</td>
</tr>
</tbody>
</table>

**FACILITIES MANAGEMENT Main Operating Funds**

<table>
<thead>
<tr>
<th>2010-11 Budget</th>
<th>2011 BUDGET</th>
<th>% OF TOTAL</th>
<th>YTD ACTIVITY</th>
<th>ENCUMBRANCES</th>
<th>TOTAL EXPENDITURES</th>
<th>REMAINING BALANCE</th>
</tr>
</thead>
<tbody>
<tr>
<td>$3,184,300</td>
<td>$3,184,300</td>
<td>100%</td>
<td>$3,184,300</td>
<td>$3,184,300</td>
<td>$3,184,300</td>
<td>$0</td>
</tr>
</tbody>
</table>

**VARIANCE (budgeted-actual)**

**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;
  ✓ Met with key stakeholders within Facilities Operations to discuss process improvements and new operational methods (i.e., use of standardized account codes, the financial report, etc.)

• **Actions Planned**
  – As part of FM’s Training and Development Academy, create training course - FM Budgeting 101 - which will focus on budget management skills. Program development placed on hold;
Facilities Management Strategic Planning Session – 4th Quarter FY 2011

GOAL #6 – Promote Good Stewardship

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

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

**Balanced Scorecard Category:** Financial Perspective
Facilities Management Strategic Planning Session – 4th Quarter FY 2011

GOAL #6 – Promote Good Stewardship

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

Measure: Main Operating Fund Variance Report

Balanced Scorecard Category: Financial Perspective

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<th>YTD ACTIVITY</th>
<th>ENCUMBRANCES</th>
<th>TOTAL EXPENDITURES</th>
<th>REMAINING BALANCE</th>
<th>VARIANCE (budgeted:actual)</th>
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</thead>
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<td>$ 2,898</td>
<td>$ 40,227</td>
<td>$ 185</td>
<td>$ 185</td>
</tr>
</tbody>
</table>

FACILITIES MANAGEMENT Main Operating Funds:
- 2010-11 Budget: $3,184,300
- YTD Activity: $3,125,852.61
- Encumbrances: $58,262.57
- Total Expenditures: $3,184,115.18
- Remaining Balance: $184.80
- Variance: $185

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;
  ✓ Met with key stakeholders within Facilities Operations to discuss process improvements and new operational methods (i.e., use of standardized account codes, the financial report, etc.)

• **Actions Planned**
  – As part of FM’s Training and Development Academy, create training course - FM Budgeting 101 - which will focus on budget management skills. Program development placed on hold;
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>Year</th>
<th>Amount ($)</th>
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</thead>
<tbody>
<tr>
<td>2008</td>
<td>$4,000</td>
</tr>
<tr>
<td>2009</td>
<td>$0</td>
</tr>
<tr>
<td>2010</td>
<td>$4,000</td>
</tr>
<tr>
<td>2011</td>
<td>$78,045</td>
</tr>
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</table>

**STATUS**

- Lead FBO

---

47
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**
  - ✓ Grant awarded for Energy Analyst position. Position reports to Energy Manager.
  - ✓ Determined best deposit venue for monies received. Dilemma: how to minimize GF restrictions on award monies received; Worked with Sponsored Programs, Budget Office and Development to determine viable, legal solution

- **Actions Planned**
  1. Encourage individuals to participate in proposal development; Suggest that brief paragraphs on conceptual ideas for grants be developed for future use by Grants Management Specialist.
  2. Boast effort to locate external funding opportunities that align with FM’s strategic vision, mission and goals.
  3. Provide assistance in developing a strong proposal response to external funding collaboration within FM.
GOAL #6 – Promote Good Stewardship

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

Facilities Management Strategic Planning Session - 4th Quarter FY 2011

Total Administrative Cost/GSF

Target Range between $0.63 and $0.57

Actual = $0.72
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

• Actions Planned
  1. Submit survey data requirements to all participants in July 2011
  2. Survey open through December 2011; Goal to submit for review to AVC-FM is end of October 2011.
  3. Review 2010 data
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

Custodial-Total Cost/GSF Comparison

2007 Baseline
$1.38 Target
$1.24 Range

- $0.50 $1.00 $1.50 $2.00 $2.50

UNC Charlotte ECU UNCG UM-BCnty UTex - Arlington UTex - San A. UNLV Western Mich SRAPPA

Custodial
GOAL #6 – Promote Good Stewardship

<table>
<thead>
<tr>
<th>Strategy</th>
<th>Objective</th>
<th>Description</th>
</tr>
</thead>
</table>
| 6.1       | 6.1.4     | Promote Fiscal Responsibility  
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. |

**ACTION 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
Facilities Management Strategic Planning Session - Fourth Quarter FY 2011

GOAL #6 - Promote Good Stewardship

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

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

Balanced Scorecard Category: Financial Perspective

Note: Peer average does not include institutions not reporting nor those which included auxiliaries (Western Michigan).
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 2010 APPA RPI Report.

• 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 2011

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
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
  1 – Pull data from 2010 APPA RDI Report.
  2 – Added additional labor services staffing to raise level of maintenance for reimbursable customers.
  3 – Calculated a cost per acre based on weighted average using acreage and found better fit.

• 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 2011

GOAL #6 – Promote Good Stewardship

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

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

Goal: $400,000.00/Qtr

Balanced Scorecard Category: Financial Perspective

---

**Quarterly Reimbursable Labor $**

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Qtr FY11</td>
<td>$318,822.00</td>
</tr>
<tr>
<td>2nd Qtr FY11</td>
<td>$349,082.00</td>
</tr>
<tr>
<td>3rd Qtr FY11</td>
<td>$240,988.00</td>
</tr>
<tr>
<td>4th Qtr FY11</td>
<td>$475,382.65</td>
</tr>
<tr>
<td>Average FY11</td>
<td>$346,068.66</td>
</tr>
</tbody>
</table>

$400,000/QTR
GOAL #6 - Promote Good Stewardship

Objective 6.1.7 Exceed Labor Services Payroll Requirements by 10%

ACTION PLAN

• Actions Complete
  1 – Utilized in-house staffing from other areas of Facilities Operations on projects rather than going to outside resources.

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

GOAL #6 – Promote Good Stewardship

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

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

Balanced Scorecard Category: Financial Perspective

Informal Projects - Materials Disposed
4th Qtr FY11

[Bar chart showing recycling and disposal of materials by quarter and total for FY11]
GOAL #6 - Promote Good Stewardship

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

**ACTION PLAN**

- **Actions Complete**

- **Actions Planned**
  - Need to determine method to separate Surplus materials and items from Residence Life out; right now they count against our recycling rates.
  - Closer monitoring on design projects to ensure weight tickets received from contractors.
  - Pursue partnerships that allow for alternative disposal methods.
Facilities Management Strategic Planning Session - Fourth Quarter FY 2011

GOAL #6 - Promote Good Stewardship

<table>
<thead>
<tr>
<th>Strategy</th>
<th>6.2</th>
<th>Develop a Sustainable Campus</th>
</tr>
</thead>
<tbody>
<tr>
<td>Objective</td>
<td>6.2.2</td>
<td>Increase Recycling of Construction and Demolition Materials on Capital Projects to 50% of Total C&amp;D Waste</td>
</tr>
</tbody>
</table>

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

**Balanced Scorecard Category:** Financial Perspective

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

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

ACTION PLAN

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

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

GOAL #6 - Promote Good Stewardship

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

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

Balanced Scorecard Category: Financial Perspective

Breakdown of Solid Waste

<table>
<thead>
<tr>
<th>Period</th>
<th>Total Solid Waste</th>
<th>Total Waste Diverted</th>
</tr>
</thead>
<tbody>
<tr>
<td>Baseline 4th Qtr FY08</td>
<td>695 tons</td>
<td>198 tons</td>
</tr>
<tr>
<td>1st Qtr FY11</td>
<td>633 tons</td>
<td>211 tons</td>
</tr>
<tr>
<td>2nd Qtr FY11</td>
<td>698 tons</td>
<td>250 tons</td>
</tr>
<tr>
<td>3rd Qtr FY11</td>
<td>666 tons</td>
<td>221 tons</td>
</tr>
<tr>
<td>4th Qtr FY11</td>
<td>741 tons</td>
<td>304 tons</td>
</tr>
</tbody>
</table>
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 quarter 41%, 36% for the year
  – Continue to provide timely and efficient collection service of recyclable and reusable items to the entire campus and outreach efforts to University community
    • Attended all SOAR and summer orientation session
  – Continue to Partnered with Housekeeping on the new mini office trash can reduction program – have provided programs in every building
  – 2 Master Students from Civil Engineering will assist Recycling/Grounds/ Sustainability Departments to design comprehensive food composting program Summer 2011 semester
  – finalize SOP for trash and recycling bin placement and design
  – Continue educational outreach and promotion
    • Continue to chair Carolina Recycling Coalition’s Collegiate Recycling Council.
    • continue to be advisors to EARTH Club and CGI
    • working with 2012 NCAPPA conference committee
  – Assist Sustainability Coordinator with Zero Waste Goal and American College & University Climate Commitment

• 1st Quarter Actions Planned
  – Continue to provide timely and efficient collection service of recyclable and reusable items to the entire campus
  – Continue educational outreach and promotion
    • will attend all new staff and faculty orientation sessions, meet with RA/RM’s, Week of Welcome Programs, etc
  – Designing Zero Waste Options for FOOTBALL
    • Student Government wrote a resolution for a ZERO WASTE FOOTBALL Stadium
  – Will develop RFP for outdoor recycling/trash bins
  – Will develop RFP for waste hauler
GOAL #6 – Promote Good Stewardship

Strategy 6.2 Develop a Sustainable Campus

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

Measure: Number of actions completed in each category

Balanced Scorecard Category: Innovation and Learning
GOAL #6 - Promote Good Stewardship

Strategy 6.2 Develop a Sustainable Campus

Objective 6.2.4 Implementation of sustainability plan actions

**ACTION PLAN**

**Actions Completed**

- Freshman Seminar
- Climate Action Planning
  - Set up working Task Force
  - Mitigation strategies brainstorming
  - Mitigation strategies Prioritization
- Sustainability Communications strategy
- Revolving Fund Proposal
GOAL #6 – Promote Good Stewardship

Strategy 6.2 Develop a Sustainable Campus

Objective 6.2.4 Implementation of sustainability plan actions

**ACTION PLAN**

- **Actions Planned**
  - Complete Climate Action Plan Mitigation Strategy Analysis
  - Start CAP Report
  - Update Sustainability Plan
  - Implementation/tracking of Best Practices
Facilities Management Strategic Planning Session - 4th Quarter FY 2011

GOAL #6 - Promote Good Stewardship

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

Measure: BTUs/SGF/Year consumed on campus

Balanced Scorecard Category: Financial Perspective

## CAMPUS ENERGY USAGE
**BTU/SGF/YEAR**

<table>
<thead>
<tr>
<th>Year</th>
<th>FY03</th>
<th>FY04</th>
<th>FY05</th>
<th>FY06</th>
<th>FY07</th>
<th>FY08</th>
<th>FY09</th>
<th>FY10</th>
<th>FY11</th>
<th>FY12</th>
<th>FY13</th>
<th>FY14</th>
<th>FY15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Base Year</td>
<td>124</td>
<td>111</td>
<td>117</td>
<td>120</td>
<td>125</td>
<td>120</td>
<td>127</td>
<td>122</td>
<td>99</td>
<td>116</td>
<td>110</td>
<td>120</td>
<td>130</td>
</tr>
</tbody>
</table>

NC State Mandate
(Base Year FY 2003)

30% Reduction by FY2015

<table>
<thead>
<tr>
<th>Year</th>
<th>FY03</th>
<th>FY04</th>
<th>FY05</th>
<th>FY06</th>
<th>FY07</th>
<th>FY08</th>
<th>FY09</th>
<th>FY10</th>
<th>FY11</th>
<th>FY12</th>
<th>FY13</th>
<th>FY14</th>
<th>FY15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goal Year</td>
<td>87</td>
<td>99</td>
<td>116</td>
<td>120</td>
<td>127</td>
<td>120</td>
<td>125</td>
<td>120</td>
<td>111</td>
<td>117</td>
<td>120</td>
<td>125</td>
<td>124</td>
</tr>
</tbody>
</table>

Lead Capital

STATUS
GOAL #6 – Promote Good Stewardship

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

CAMPUS ENERGY USAGE
BTU/GSF-DD (Heated Gross Feet)

STATUS

FY08 FY09 FY10 FY11
0 20 40 60 80 100
GOAL #6 - Promote Good Stewardship

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

DEGREE DAY COMPARISON

- 2008
- 2009
- 2010
- 2011
GOAL #6 - Promote Good Stewardship

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

ACTION PLAN - ENERGY

- **Actions Complete**
  - Performance contract progressing.
  - Hired Energy Analyst with ARRA funding, permanent time-limited. (End 2-29-12)
  - Space Temperature Guidelines accepted by BOT & Chancellor – to be reviewed after 6 months
  - RFQ prepared for Atkins retro-commissioning (ARRA funded)

- **Actions Planned**
  - Complete Engineering and Zone coordination for energy operation.
  - Update our Strategic Energy Plan for the State Energy Office.
  - Complete campus master plan for energy conservation.
  - Continue with PM/CM roles for energy projects.
  - Focus on identifying problem buildings and root causes for energy inefficiencies.
GOAL #6 – Promote Good Stewardship

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

ACTION PLAN - ESPC

Energy Savings Performance Contract

• Actions Complete
  ▪ ESCO (Ameresco) close to completing 90% IGA.
  ▪ 3rd Party consultant, Celtic Energy, continues to provide support and evaluation of IGA.

• Actions Planned
  ▪ Investment Grade Audit (IGA) 90% submission
    ▪ Finalize acceptable ECMs.
      ▪ Energy Services Agreement (ESA) signed (September 2011)
Facilities Management Strategic Planning Session - Fourth Quarter FY 2011

GOAL #6 - Promote Good Stewardship

Strategy 6.5  Improve Historically Underutilized Business (HUB) Participation
Objective 6.5.1  12% HUB participation on 80% of Capital Projects

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

Balanced Scorecard Category: Internal Business Process

<table>
<thead>
<tr>
<th>Strategic Review</th>
<th>Total Projects Completed</th>
<th>Projects with 12% HUB Participation</th>
<th>Percentage of Projects Meeting 80% Goal</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY2010</td>
<td>6</td>
<td>4</td>
<td>67%</td>
</tr>
<tr>
<td>1stQtrFY11</td>
<td>3</td>
<td>1</td>
<td>33%</td>
</tr>
<tr>
<td>2ndQtrFY11</td>
<td>4</td>
<td>3</td>
<td>75%</td>
</tr>
<tr>
<td>3rdQtrFY11</td>
<td>1</td>
<td>1</td>
<td>100%</td>
</tr>
<tr>
<td>4thQtrFY11</td>
<td>1</td>
<td>1</td>
<td>100%</td>
</tr>
<tr>
<td>FY2011</td>
<td>9</td>
<td>6</td>
<td>67%</td>
</tr>
</tbody>
</table>

Capital Projects - HUB Participation

- Total Projects Completed
- Projects with 12% HUB Participation

FY2010: 67%
1stQtrFY11: 33%
2ndQtrFY11: 100%
3rdQtrFY11: 100%
4thQtrFY11: 67%
FY2011: 67%
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 Completed
  ✓ Bonding Workshop
  ✓ MBE Advisory Board Meeting
  ✓ Turner School of Construction Management
  ✓ Triad Coalition Minority Construction & Supplier Outreach Event
  ✓ UNC-CH Bell Tower Year End Review

• Actions Planned
  Continue –
  ▪ Encourage GCs to exceed 10% HUB participation goal
  ▪ Work with GC/CMs to identify HUB subcontractors/partners
  ▪ Promote mentor-protégé/partnerships/joint venture relationships at 1st tier subcontractor level
  ▪ Work with GCs/agencies/organizations to identify/provide training to promote HUB growth and development
  ▪ Monitor Program/Educate Business Community/Outreach Efforts
Facilities Management Strategic Planning Session - Fourth Quarter FY 2011

GOAL #6 - Promote Good Stewardship

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

Measure: Total African American Dollars divided by Total Contract Dollars

Balanced Scorecard Category: Internal Business Process

<table>
<thead>
<tr>
<th>Strategic Review</th>
<th>Total Contract Dollars</th>
<th>African American Dollars</th>
<th>AA Percentage 3% GOAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY2010</td>
<td>$89,561,668</td>
<td>$4,230,479</td>
<td>5%</td>
</tr>
<tr>
<td>1st Qtr FY11</td>
<td>$3,190,214</td>
<td>$80,864</td>
<td>3%</td>
</tr>
<tr>
<td>2ndQtrFY11</td>
<td>$2,677,018</td>
<td>$165,262</td>
<td>6%</td>
</tr>
<tr>
<td>3rdQtrFY11</td>
<td>$6,653,139</td>
<td>$6,125</td>
<td>0%</td>
</tr>
<tr>
<td>4thQtrFY11</td>
<td>$5,131,000</td>
<td>$46,455</td>
<td>1%</td>
</tr>
<tr>
<td>FY2011</td>
<td>$17,651,371</td>
<td>$298,706</td>
<td>2%</td>
</tr>
</tbody>
</table>

Capital Projects – African American Participation

- Total Contract Dollars
- African American Dollars
- Percentage Achieved

- FY2010: 5%
- 1st Qtr FY11: 3%
- 2nd Qtr FY11: 6%
- 3rd Qtr FY11: 1%
- 4th Qtr FY11: 2%
- FY2011: 2%
GOAL #6 - Promote Good Stewardship

<table>
<thead>
<tr>
<th>Strategy</th>
<th>6.5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Objective</td>
<td>6.5.2</td>
</tr>
</tbody>
</table>

Improve African American Participation on Capital Projects
3% African American Participation on Capital Projects

ACTION PLAN

• **Actions Completed**
  - ✓ MBE Advisory Board Meeting
  - ✓ Turner School of Construction Management
  - ✓ Triad Coalition Minority Construction & Supplier Outreach Event
  - ✓ UNC-CH Bell Tower Year End Review

• **Actions Planned**
  
  Continue –
  - Educate African American firms on the process
  - Encourage African American firms to bid university projects
  - Promote mentor-protégé/partnerships/joint venture relationships between African American/other minority/non-minority firms
  - Work with GCs/agencies/organizations to identify firms and “best practices” for increasing African American participation on public/private sector projects
Facilities Management Strategic Planning Session - Fourth Quarter FY 2011

GOAL #6 - Promote Good Stewardship

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

**Objective**  6.5.3  13% overall HUB participation on Informal contracts $30,000 and above

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

**Balanced Scorecard Category:** Internal Business Process

<table>
<thead>
<tr>
<th>Strategic Review</th>
<th>Total Contract Dollars</th>
<th>HUB Dollars</th>
<th>HUB Dollars Percentage 13% GOAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY2010</td>
<td>$2,751,672</td>
<td>$652,717</td>
<td>24%</td>
</tr>
<tr>
<td>1stQtrFY11</td>
<td>$1,282,661</td>
<td>$176,569</td>
<td>14%</td>
</tr>
<tr>
<td>2ndQtrFY11</td>
<td>No Data Reported</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3rdQtrFY11</td>
<td>$367,733</td>
<td>$184,118</td>
<td>50%</td>
</tr>
<tr>
<td>4thQtrFY11</td>
<td>$731,566</td>
<td>$202,619</td>
<td>28%</td>
</tr>
<tr>
<td>FY2011</td>
<td>$2,381,960</td>
<td>$563,306</td>
<td>24%</td>
</tr>
</tbody>
</table>

Informal Projects (≥$30K) - HUB Participation

- **Total Contract Dollars**
- **HUB Dollars**
- **Percentage Achieved**

<table>
<thead>
<tr>
<th>FY</th>
<th>Total Contract Dollars</th>
<th>HUB Dollars</th>
<th>Percentage Achieved</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY2010</td>
<td>$2,751,672</td>
<td>$652,717</td>
<td>24%</td>
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<td>$202,619</td>
<td>28%</td>
</tr>
<tr>
<td>FY2011</td>
<td>$2,381,960</td>
<td>$563,306</td>
<td>24%</td>
</tr>
</tbody>
</table>
GOAL #6 - Promote Good Stewardship

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

ACTION PLAN

• Actions to Continue
  - Encourage/Invite HUB firms to bid Informal Projects
  - Work with Design Services, Materials Management, and other campus organizations to
    - Identify HUB firms pursuing work on UNC Charlotte campus
    - Assist HUB firms working on UNC Charlotte
  - Educate business community on the process
  - Provide project/event information to the public
  - Community outreach efforts
GOAL # 6 - Promote Good Stewardship

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

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

Balanced Scorecard Category: Internal Business Process

<table>
<thead>
<tr>
<th>QUARTERLY REVIEW</th>
<th>Value of Contracts under 30K</th>
<th>H.U.B. Contribution</th>
<th>HUB Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY’08</td>
<td>$2,861,776</td>
<td>$608,415</td>
<td>21.3%</td>
</tr>
<tr>
<td>FY’09</td>
<td>$1,404,456</td>
<td>$163,049</td>
<td>11.6%</td>
</tr>
<tr>
<td>FY’10</td>
<td>$2,626,647</td>
<td>$214,381</td>
<td>8.2%</td>
</tr>
<tr>
<td>QTR 1</td>
<td>$684,520</td>
<td>$122,224</td>
<td>17.9%</td>
</tr>
<tr>
<td>QTR 2</td>
<td>$1,400,523</td>
<td>$167,415</td>
<td>12.0%</td>
</tr>
<tr>
<td>QTR 3</td>
<td>$1,839,059</td>
<td>$567,486</td>
<td>30.9%</td>
</tr>
<tr>
<td>QTR 4</td>
<td>$2,320,854</td>
<td>$467,483</td>
<td>20.1%</td>
</tr>
<tr>
<td>FY ’11 STATUS</td>
<td>$6,244,956</td>
<td>$1,324,607</td>
<td>21.2%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>QUARTERLY REVIEW</th>
<th>Value of Contracts under 30K</th>
<th>African Am. Contribution</th>
<th>African Am. Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY’08</td>
<td>$2,861,776</td>
<td>$530,550</td>
<td>18.5%</td>
</tr>
<tr>
<td>FY’09</td>
<td>$1,404,456</td>
<td>$75,961</td>
<td>5.4%</td>
</tr>
<tr>
<td>FY’10</td>
<td>$2,626,647</td>
<td>$113,196</td>
<td>4.3%</td>
</tr>
<tr>
<td>QTR 1</td>
<td>$684,520</td>
<td>$15,750</td>
<td>2.3%</td>
</tr>
<tr>
<td>QTR 2</td>
<td>$1,400,523</td>
<td>$625</td>
<td>0.0%</td>
</tr>
<tr>
<td>QTR 3</td>
<td>$1,839,059</td>
<td>$61,002</td>
<td>3.3%</td>
</tr>
<tr>
<td>QTR 4</td>
<td>$2,320,854</td>
<td>$29,699</td>
<td>1.3%</td>
</tr>
<tr>
<td>FY ’11 STATUS</td>
<td>$6,244,956</td>
<td>$107,076</td>
<td>1.7%</td>
</tr>
</tbody>
</table>
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

6.5.3 - Actions Completed:

6.5.4 - Actions Planned:

- Continue to work with FIS on reports for extracting project data from Archibus - on going.
- Reporting process by utilizing Project Number, PO Date and Contract Amount - on going.
- Continue refining HUB reporting information in regards to Strategic Planning information - on going.
- Stress usage of HUB firms with Project Coordinators - on going.
## DISCUSSION

### FINANCIAL PERSPECTIVE

<table>
<thead>
<tr>
<th>Perspective</th>
<th>Strategic Objective</th>
<th>Goal</th>
<th>Lag Measures/Lead Measures</th>
<th>Target</th>
<th>Actual</th>
<th>1st Quarter</th>
<th>2nd Quarter</th>
<th>3rd Quarter</th>
<th>4th Quarter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage Budget</td>
<td>6.1.1</td>
<td>Balanced Budget @ End of Year</td>
<td>100% 100%</td>
<td>Annual FY 10 Annual FY 11 Annual FY 11</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Maximize Revenue Streams</td>
<td>6.1.2</td>
<td>Increase Grants/Supplemental Funding</td>
<td>25% 578K</td>
<td>Annual FY 11 Annual FY 11</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Promote fiscal responsibility</td>
<td>6.1.3</td>
<td>Admin Cost/GSF +/-5% of APPA Avg for Peer Inst.</td>
<td>+/-5%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>6.1.4</td>
<td>Custodial Cost/GSF +/-5% of APPA Avg for Peer Inst</td>
<td>+/-5%</td>
<td></td>
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<tr>
<td></td>
<td>6.1.5</td>
<td>Maint Cost/GSF +/- 5% of APPA Avg for Peer Inst</td>
<td>+/-5%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>6.1.6</td>
<td>Landscape Cost/GSF +/-5% of APPA Avg for Peer Inst</td>
<td>+/-5%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>6.1.7</td>
<td>Exceed Labor Services Payroll requirements by 10%</td>
<td>$400,000/qtr No data</td>
<td></td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Sustainable Practices</td>
<td>6.2.1</td>
<td>C&amp;D Recycling - Informal Projects</td>
<td>50% 32%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>6.2.2</td>
<td>C&amp;D Recycling Capital Projects</td>
<td>50% 85%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>6.2.3</td>
<td>Increase % Solid Waste Recycled (Baseline 2007)</td>
<td>5% (25.27%) 41%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>6.2.4</td>
<td>Implement 50% of each 2008 Sustainability goals</td>
<td>50% 66%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Conserve Natural Resources</td>
<td>6.3.1</td>
<td>Energy Usage by 2015</td>
<td>-30%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>6.3.2</td>
<td>Water Usage by 2010</td>
<td>-20% or 43 Gal/GSF</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Improve HUB Participation</td>
<td>6.5.1</td>
<td>12% HUB participation on 80% of Capital Projects</td>
<td>80% 67%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>6.5.2</td>
<td>3% African American Participation on Capital Projects</td>
<td>3% 2%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>6.5.3</td>
<td>13% HUB participation on Informal Proj $30K and above</td>
<td>13% 24%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>6.5.4</td>
<td>13% HUB for Informal Proj below $30,000 inc. 3% AA</td>
<td>13%/3%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>6.5.5</td>
<td>Combined with 6.5.4</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>
Balance Score Card

INTERNAL PROCESSES

Perspective

Strategic Objectives:
- Labor Availability
- Logistics Efficiency
- Optimize Supply Chain
- Improve Process Reliability
- Manage Technical Resources
- Master/Project Planning Process
- Capital Project Administration
- Develop High-Quality Staff
Facilities Management Strategic Planning Session - Fourth Quarter FY 2011

GOAL #1 - Improve maintenance and operations of the Campus

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

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

Goal: Greater than 80% for the year

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

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

ACTION PLAN

• Actions Complete
  1 – Continued improvement of accounting practices for time applied to WR’s.
  2 – Continued development of the PM program.

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

GOAL #1 - Improve maintenance and operations of the Campus

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

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

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 – No actions taken. Restocking being controlled by SDI’s automated system.

- **Actions Planned**
  
  1 - Continue to let automated system control and see how it works.
  2 - Adding items that have been ordered repeatedly as non-stock items to stock as order-on-request items (carried at an inventory level of “zero” but pre-sourced for faster ordering and delivery).
  3 - Late deliveries and spikes in usage were the main causes for inability to fill.
Facilities Management Strategic Planning Session - Fourth Quarter FY 2011

GOAL #1 - Improve maintenance and operations of the Campus

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

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

Goal: Less than 4 days

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

Strategy: 1.2
Objective: 1.2.2

Improve Logistics Efficiency
Reduce Average Non-stock Requisition to Receipt Time to 4.0 Days

ACTION PLAN

• Actions Complete
  1 – Supervisors average approval time decreased from 10.6 hrs. in 2nd Qtr of this year to 8.65 hrs. in 3rd Qtr.
  2 – Monthly non-stock orders averaged 366 for all of FY10. First 3 Qtrs FY11 averaged 290 a month; a 20% decrease over FY10’s average.

• Actions Planned
  1 – Non-stock items that have been ordered on a recurring basis are being added to stock inventory as ORO (Ordered On Request Only).
GOAL #1 - Improve maintenance and operations of the Campus

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

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

Goal: Greater than 90%

Balanced Scorecard Category: Internal Business Process

Preventive Maintenance

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Qtr FY11</td>
<td>91.19%</td>
</tr>
<tr>
<td>2nd Qtr FY11</td>
<td>90.00%</td>
</tr>
<tr>
<td>3rd Qtr FY11</td>
<td>87.30%</td>
</tr>
<tr>
<td>4th Qtr FY11</td>
<td>90.10%</td>
</tr>
<tr>
<td>Average FY11 (year-to-date)</td>
<td>89.65%</td>
</tr>
</tbody>
</table>

Goal > 90%
GOAL #1 - Improve Facilities Operations

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

ACTION PLAN

• Actions Complete
  1 – Continue development of PM Program.

• Actions Planned
  1 – Complete development of PM Program.
  2 – Closer monitoring of PM completions by Supervisor and Managers.

Lead F. O.
Facilities Management Strategic Planning Session – Fourth Quarter FY 2011

GOAL #1 - Improve maintenance and operations of the Campus

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

Measure: Number of Unscheduled Equipment Replacement Projects in Quarter

Goal: Less than 8 per year or 2 per quarter

Balanced Scorecard Category: Internal Business Process

![Bar chart showing Unscheduled Equipment Replacement Projects](image)
GOAL #1 - Improve Facilities Operations

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

**ACTION PLAN**

- **Actions Complete**
  1 – Continued adding equipment to PM program.

- **Actions Planned**
  1 – Continue expansion of PM Program.
  2 – Continue expansion of predictive maintenance program.
Facilities Information Systems
FM 5YP Prioritized Projects – FY11

2. Enterprise Data Assistant (EDA) Project for Recycling
3. Enterprise Data Assistant (EDA) Project for FO-WR
4. ARCHIBUS Web Central Space Audit
5. Tridium Energy Management – Inventory and Energy Reporting
6. ARCHIBUS Key Management – Phase One & Two
7. ARCHIBUS Capital Financial Management
Facilities Management Strategic Planning Session - Fourth Quarter FY 2011

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

Strategy: 2.1 Maximize Facilities Management Effectiveness and Efficiency through Information Technology
Objective: 2.1.1 Completion of the Facilities Management Five-Year Technology Plan by Fiscal 2015

Measure: Completion of Five-Year Technology Milestones
Task Completion Milestones Percentage (FY10 - FY15)

Balanced Scorecard Category: Internal Processes

Qtr 1 FY11: 22.29%
Qtr 2 FY11: 34.25%
Qtr 3 FY11: 70.00%
Qtr 4 FY11: 95.91%

Cumulative Project Average: 100.00%
Baseline Average/12 month:

Lead FIS

STATUS
Facilities Management Strategic Planning Session - Fourth Quarter FY 2011

GOAL #2 - Successfully Adapt Existing Facilities to Meet New Requirements
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. Enterprise Data Assistant (EDA) pilot began for Recycling. FO WR development completed.
2. CRDM Development Phase completed; first phase of User Testing completed and requested changes are completed. Phase one pilot scheduled for Sept/Oct.
3. BAS/Tridium – Dashboard training completed. BAS Inventory, issues list completed and is now in ARCHIBUS EQ inventory
4. Finalizing development issues and bugs identified in phase one for ARCHIBUS Capital Financial Management. Go Live is Aug 8th. Final Training session scheduled for Aug 15th
5. Key Management Phase 2 Requirements completed - Development Underway.

Actions Planned:

1. Finalize close out for CRDM and Capital Financial Mgmt
2. Finalize close out for Capital Funds Mgmt
3. Finalize Pilot for Key Mgmt Phase (Customer Key Form)
4. EDA Pilot with Zone 2
5. Collect results of Recycling EDA pilot
6. Begin FY12-13 Projects
# Facilities Technology Steering Committee – Priorities for FY12-13

<table>
<thead>
<tr>
<th>Number</th>
<th>Title</th>
<th>Start</th>
<th>End</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Archibus FO Updates (Includes EDA Pilot)</td>
<td>Sept 2011</td>
<td>Dec 2011</td>
</tr>
<tr>
<td>2</td>
<td>Banner/Archibus Reports</td>
<td>Jul 2011</td>
<td>Jul 2012</td>
</tr>
<tr>
<td>3</td>
<td>BAS Alarming</td>
<td>Jun 2011</td>
<td>Dec 2011</td>
</tr>
<tr>
<td>4</td>
<td>Archibus Cleanup</td>
<td>Oct 2011</td>
<td>Dec 2011</td>
</tr>
<tr>
<td>5</td>
<td>Archibus Training Program Improvements</td>
<td>Oct 2011</td>
<td>May 2012</td>
</tr>
<tr>
<td>6</td>
<td>FO Work Request Process Improvement</td>
<td>TBD - FY12 - FY13</td>
<td>TBD - FY12 - FY13</td>
</tr>
<tr>
<td>7</td>
<td>FO Equipment Management Process Improvement</td>
<td>TBD - FY12 - FY13</td>
<td>TBD - FY12 - FY13</td>
</tr>
<tr>
<td>8</td>
<td>FO Preventive Maintenance Process Improvement</td>
<td>TBD - FY12 - FY13</td>
<td>TBD - FY12 - FY13</td>
</tr>
<tr>
<td>9</td>
<td>FCAP - Archibus Condition Assessment</td>
<td>TBD - FY12 - FY13</td>
<td>TBD - FY12 - FY13</td>
</tr>
<tr>
<td>10</td>
<td>Warehouse/SDI Process Improvement</td>
<td>TBD - FY12 - FY13</td>
<td>TBD - FY12 - FY13</td>
</tr>
</tbody>
</table>
GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

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

Objective 2.3.1. 80% of existing projects documented and input into the CRDM system by July 2011.

Measure: % of projects documented and input into the CRDM system by July, 2011.

Lead: Architectural Planning Dept

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

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

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

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

Lead: Architectural Planning Dept

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

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

Measure: % of sections updated and posted.

Lead: “Architectural Planning Dept”

Strategy 3.7: Improve space utilization throughout the university.

Objective 3.7.1.1 100% of space audits by Division; Documented and updated into Archibus NLT December 2012.

Measure: % Initial audits and updates completed.

Lead: “Architectural Planning Dept”
Facilities Management Strategic Planning Session - Fourth Quarter FY 2011

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

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

Objective 2.3.1. 80% of existing projects documented and input into the CRDM system by July 2011.

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

Balanced Scorecard Category: Internal Business Process

Percentage of Completion – 0%

Submission

Funding Approval

Committee Approval

Scopes/ Estimates

Draft Prioritization

2nd Qtr FY 11  3rd Qtr FY 11  4th Qtr FY 11  1st Qtr FY 12

0 10 20 30 40 50 60 70 80 90 100

Status
Facilities Management Strategic Planning Session - Fourth Quarter FY 2011

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

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

Objective 2.3.1. 80% of existing projects documented and input into the CRDM system by July 2011. Measure: % of projects documented and input into the CRDM system.

Balanced Scorecard Category: Internal Business Process

ACTION PLAN

• Actions Complete
  • Consolidated R & R List
  • List under review by M & O
  • Worked with FIS to develop CRDM in Archibus
  • Receive review by M & O

• Actions Planned:
  • Implementation of CRDM
  • Data entry of existing list
  • Prioritization
  • Prep for committee meetings/ funding meetings/ submission
Facilities Management Strategic Planning Session - Fourth Quarter FY 2011

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

Strategy 3.2 Improve the Six Year Plan for Appropriated Capital Improvements

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

Measure: % of projects with completed (pre-programs, OC25s, and Approvals).
Balanced Scorecard Category: Internal Business Process

Percentage of Completion

<table>
<thead>
<tr>
<th>Quarter</th>
<th>FY 11 Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>2nd Qtr</td>
<td>30%</td>
</tr>
<tr>
<td>3rd Qtr</td>
<td>90%</td>
</tr>
<tr>
<td>4th Qtr</td>
<td>90%</td>
</tr>
<tr>
<td>1st Qtr</td>
<td>90%</td>
</tr>
</tbody>
</table>
Facilities Management Strategic Planning Session – Fourth Quarter FY 2011

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

Strategy 3.2 Improve the Six Year Plan for Appropriated Capital Improvements

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

**ACTION PLAN**

Appropriated Projects

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

* Pending AA review, changes, and approval

- Actions Complete
  Appropriated List submitted

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

- Actions Planned: Pre-programming
  - Continue to work down the list
  - We are told by Jay Raja that we can begin preprogramming at his convenience.
Facilities Management Strategic Planning Session - Fourth Quarter FY 2011

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

Strategy 3.5: Improve Infrastructure improvement planning

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

Measure: % infrastructure projects associated with Capital Projects on the 6 year plan (appropriated and non-appropriated)
GOAL #3 - Deliver New Facilities that Support the University’s Mission

Strategy 3.5: Improve Infrastructure improvement planning

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

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

Balanced Scorecard Category: Internal Business Process

ACTI ON PLAN

- Actions Complete:
  - Receive list of projects and estimates from ASG
  - Establish Capital Project Areas of Responsibility
  - Integrate List of Infrastructure into Capital Projects
  - Add estimates of probable costs for infrastructure to the estimates
  - Submitted revised estimates to GA

- Actions Planned:
  - Updates as required
Facilities Management Strategic Planning Session - Fourth Quarter FY 2011

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

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

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

Measure: % of sections updated and posted.

Balanced Scorecard Category: Internal Business Process
Facilities Management Strategic Planning Session - Fourth Quarter FY 2011

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

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

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

Measure: % of sections updated and posted.
Balanced Scorecard Category: Internal Business Process

ACTION PLAN

• Actions Complete:
  o ASG has provided their “final” product
  o Architectural Planning Team has gone through entire document for corrections
  o Design manual has been posted
  o A meeting was held with the departments and sections for review distributed.

• Actions Planned:
  o Receive input from the Departments
  o Compile changes
  o Conduct quarterly updates
Facilities Management Strategic Planning Session - Fourth Quarter FY 2011

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

Strategy 3.7: Improve space utilization throughout the university.

Objective 3.7.1.1 100% of space audits by Division; Documented and updated into Archibus NLT December 2012.

Measure: % Initial audits and updates completed.
Facilities Management Strategic Planning Session - Fourth Quarter FY 2011

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

Strategy 3.7: Improve space utilization throughout the university.

Objective 3.7.1.1 100% of space audits by Division; Documented and updated into Archibus NLT December 2012.

Measure: % Initial audits and updates completed.
Balanced Scorecard Category: Internal Business Process

ACTION PLAN

• Actions Complete:
  o BA Audit 75% complete to date
  o AA Audit 75% complete to date

• Actions Planned:
  o AA complete NLT end of June, 2011 (Depends on AA)
  o BA completed NLT end of July, 2011
  o Remainder completed NLT Oct, 2011
  o Spot inspections/ checks competed NLT Dec 2011
Facilities Management Strategic Planning Session - Fourth Quarter FY 2011

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

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

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

**Balanced Scorecard Category:** Internal Business Process

<table>
<thead>
<tr>
<th>STRATEGIC REVIEW by Fiscal Year (July-June)</th>
<th>No. of projects authorized in Capstat</th>
<th>Designer under contract within 120 days</th>
<th>Designer not under contract within 120 days</th>
<th>% Designers under contract w/in</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summary FY-09</td>
<td>9</td>
<td>3</td>
<td>4</td>
<td>33.30%</td>
</tr>
<tr>
<td>Summary FY-10</td>
<td>10</td>
<td>9</td>
<td>3</td>
<td>75.0%</td>
</tr>
<tr>
<td>Summary FY-11</td>
<td>11</td>
<td>2</td>
<td>6</td>
<td>25.0%</td>
</tr>
<tr>
<td>1st Qtr. FY-11</td>
<td>5</td>
<td>0</td>
<td>2</td>
<td>40.0%</td>
</tr>
<tr>
<td>2nd Qtr. FY-11</td>
<td>4</td>
<td>1</td>
<td>0</td>
<td>100.0%</td>
</tr>
<tr>
<td>3rd Qtr. FY-11</td>
<td>2</td>
<td>0</td>
<td>3</td>
<td>0.0%</td>
</tr>
<tr>
<td>4th Qtr. FY-11</td>
<td>0</td>
<td>1</td>
<td>1</td>
<td>50.00%</td>
</tr>
</tbody>
</table>

**Objective for 4th Quarter is 50%**  
**Year to date is 25%**
Facilities Management Strategic Planning Session - Fourth Quarter FY 2011

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

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

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

Balanced Scorecard Category: Internal Business Process

<table>
<thead>
<tr>
<th>STRATEGIC REVIEW by Fiscal Year (July-June)</th>
<th>No. of projects completed by scheduled time</th>
<th># not completed by scheduled time</th>
<th>% Designs complete by completion time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summary FY-09</td>
<td>4</td>
<td>0</td>
<td>100.00%</td>
</tr>
<tr>
<td>Summary FY-10</td>
<td>9</td>
<td>5</td>
<td>63.00%</td>
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<tr>
<td>Summary FY-11</td>
<td>6</td>
<td>0</td>
<td>100.00%</td>
</tr>
<tr>
<td>1st Qtr. FY-11</td>
<td>2</td>
<td>0</td>
<td>100.00%</td>
</tr>
<tr>
<td>2nd Qtr. FY-11</td>
<td>1</td>
<td>0</td>
<td>100.00%</td>
</tr>
<tr>
<td>3rd Qtr. FY-11</td>
<td>2</td>
<td>0</td>
<td>100.00%</td>
</tr>
<tr>
<td>4th Qtr. FY-11</td>
<td>1</td>
<td>0</td>
<td>100.00%</td>
</tr>
</tbody>
</table>

Objective for 4th Quarter is 100%
Year to date is 100%
Facilities Management Strategic Planning Session – Fourth Quarter FY 2011

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

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

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

Balanced Scorecard Category: Financial Perspective

<table>
<thead>
<tr>
<th>Projects</th>
<th>OC25</th>
<th>Initial Contract</th>
<th>Final/Current Contract</th>
<th>Percent Difference Between OC25 &amp; Initial</th>
<th>Percent Difference Between Initial &amp; Final Contract</th>
<th>Completed Within Design Budget (1=yes, 0=no)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Football/Sports</td>
<td>$3,950,000</td>
<td>$2,739,800</td>
<td>$3,224,472</td>
<td>-30.6%</td>
<td>17.7%</td>
<td>0</td>
</tr>
<tr>
<td>Motorsports II</td>
<td>$399,000</td>
<td>$303,000</td>
<td>$303,700</td>
<td>-24.1%</td>
<td>0.2%</td>
<td>0</td>
</tr>
<tr>
<td>Parking Deck I</td>
<td>$1,701,000</td>
<td>$1,044,000</td>
<td>$802,869</td>
<td>-38.6%</td>
<td>-23.1%</td>
<td>1</td>
</tr>
<tr>
<td>Parking Deck J</td>
<td>$2,211,057</td>
<td>$946,200</td>
<td>$0</td>
<td>-57.2%</td>
<td>0.0%</td>
<td>0</td>
</tr>
<tr>
<td>RDH Renovation</td>
<td>$1,742,048</td>
<td>$0</td>
<td>$0</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0</td>
</tr>
<tr>
<td>Res. Hall Ph. X</td>
<td>$2,809,632</td>
<td>$2,167,790</td>
<td>$0</td>
<td>-22.8%</td>
<td>0.0%</td>
<td>0</td>
</tr>
<tr>
<td>Res. Hall Ph. XI</td>
<td>$3,695,657</td>
<td>$2,078,598</td>
<td>$0</td>
<td>-43.8%</td>
<td>0.0%</td>
<td>0</td>
</tr>
<tr>
<td>Res. Hall Moore &amp; Sanford</td>
<td>$503,000</td>
<td>$435,000</td>
<td>$435,000</td>
<td>-13.5%</td>
<td>0.0%</td>
<td>1</td>
</tr>
<tr>
<td>Tennis Courts</td>
<td>$292,972</td>
<td>$275,000</td>
<td>$275,000</td>
<td>-6.1%</td>
<td>0.0%</td>
<td>1</td>
</tr>
<tr>
<td>Heck Dam</td>
<td>$190,000</td>
<td>$185,650</td>
<td>$0</td>
<td>-2.3%</td>
<td>0.0%</td>
<td>0</td>
</tr>
<tr>
<td>Demo Phase III</td>
<td>$45,455</td>
<td>$32,500</td>
<td>$0</td>
<td>-28.5%</td>
<td>0.0%</td>
<td>0</td>
</tr>
</tbody>
</table>

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

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

Strategy 3.4
Objective 3.4.2

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

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

Balanced Scorecard Category: Internal Business Process

*Factors in contract $$ changes could include: Owner changes in construction, unforeseen conditions, design omissions.
### Balance Score Card

#### DISCUSSION

#### INTERNAL PROCESSES PERSPECTIVE

<table>
<thead>
<tr>
<th>Perspective</th>
<th>Strategic Objective</th>
<th>Goal</th>
<th>Lag Measures/Lead Measures</th>
<th>Target</th>
<th>Actual</th>
<th>1st Quarter</th>
<th>2nd Quarter</th>
<th>3rd Quarter</th>
<th>4th Quarter</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Labor Availability</strong></td>
<td>1.1</td>
<td>Increase Wrench Time</td>
<td>&gt;80%</td>
<td>No data</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Logistics Efficiency</strong></td>
<td>1.2</td>
<td>Stock Fill Rate</td>
<td>&gt;97%</td>
<td>No data</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Optimize Supply Chain</strong></td>
<td>1.2.2</td>
<td>Non-stock cycle time (request to receipt time)</td>
<td>&lt;4 days</td>
<td>No data</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Improve Process Reliability</strong></td>
<td>1.5.1</td>
<td>On-time Prev. Maintenance completion</td>
<td>&gt; 90%</td>
<td>No data</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Manage Technical Resources</strong></td>
<td>2.1.1</td>
<td>Completion of FM 5-YR Tech. Plan by 2015</td>
<td>100%</td>
<td>85.9%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Master/Project Planning Process</strong></td>
<td>2.3.1</td>
<td>80% of Existing Projects Documented and Input into the CRDM by July 2011. (updated Third Qtr FY11)</td>
<td>80%</td>
<td>80%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Projects on the Non-appropriated Six Year Plan have completed pre-programs</strong></td>
<td>3.2.2</td>
<td></td>
<td>80%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>% Projects with completed OC-25s - Appropriated</strong></td>
<td>3.2.3</td>
<td></td>
<td>75%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>% Projects with completed OC-25s - Non-Approp.</strong></td>
<td>3.2.4</td>
<td></td>
<td>75%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>80% of Infrastructure Projects Integrated into Capital Construction Project Scopes</strong></td>
<td>3.5.1</td>
<td></td>
<td>80%</td>
<td>100%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>80% of Revisions Integrated into the Design and Construction Manual.</strong></td>
<td>3.6.1</td>
<td></td>
<td>80%</td>
<td>80%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>100% of Space Audits by Division; Documented and Updated into Archibus NLT December 2012.</strong></td>
<td>3.7.1</td>
<td></td>
<td>100%</td>
<td>75%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Designers Under Contract w/in 120 days of Posting in CAPSTAT</strong></td>
<td>3.3.1</td>
<td></td>
<td>90% w/in 120</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>90% of Designs Complete by Scheduled Comp. Date</strong></td>
<td>3.3.2</td>
<td></td>
<td>90%</td>
<td>100%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>90% of Designs w/in Design Budgeted Fee</strong></td>
<td>3.3.3</td>
<td></td>
<td>90%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>95% of Cap Profs completed w/in orig contract or GMP</strong></td>
<td>3.4.2</td>
<td></td>
<td>95%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Balance Score Card

Learning & Growth Perspective

Strategic Objectives:
- Develop high quality staff
- Retain high quality staff
- Develop positive culture
- Improve Employee Safety
Facilities Management Strategic Planning Session – 4th Quarter FY 2011

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

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

Measure: Days needed to fill vacant position

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

Average Number of Days to Fill Nonexempt (Hourly) Vacancies

Goal: 80 days
Facilities Management Strategic Planning Session - 4th Quarter FY 2011

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

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

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

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

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

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

<table>
<thead>
<tr>
<th>Quarter</th>
<th># of Exempt Hires</th>
<th>Average Number of Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q1</td>
<td>4</td>
<td>149</td>
</tr>
<tr>
<td>Q2</td>
<td>1</td>
<td>86</td>
</tr>
<tr>
<td>Q3</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Q4</td>
<td>2</td>
<td>428</td>
</tr>
</tbody>
</table>

**Goal:** 120 days
Facilities Management Strategic Planning Session - 4th Quarter FY 2011

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

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

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

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

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

---

**ACTION PLAN**

- **Actions Complete**
  - Revamped Hiring Process
  - Implemented new HRIS for FM HR
  - Reviewed new PeopleAdmin program.

- **Actions Planned**
  1. Work with Campus HR to ensure successful implementation on August 1st.
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
Facilities Management Strategic Planning Session - 4th Quarter FY 2011

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

<table>
<thead>
<tr>
<th>Strategy</th>
<th>Objective 5.1</th>
<th>Recruit a talented and diverse workforce in a timely fashion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Objective</td>
<td>5.1.2</td>
<td>100% of positions filled through targeted selection process by FY 2010</td>
</tr>
</tbody>
</table>

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

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

**ACTION PLAN**

- **Actions Complete**

- **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 - 4th Quarter FY 2011

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

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

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

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

---

**FY 11**

*Training Hours for Supervisors, Managers & Directors by Quarter*

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Training Hours by QTR</th>
<th>YTD Training Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q1</td>
<td>184.5 hrs</td>
<td></td>
</tr>
<tr>
<td>Q2</td>
<td>292.5 hrs</td>
<td>477 hrs</td>
</tr>
<tr>
<td>Q3</td>
<td>270.5 hrs</td>
<td>746 hrs</td>
</tr>
<tr>
<td>Q4</td>
<td>171 hrs</td>
<td>917 hrs</td>
</tr>
</tbody>
</table>

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

**Fiscal 2011 Results:**

- **Goal:** 1720 hrs
- **Actual:** 917 hrs (53%)

---

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

Strategy 5.2
Objective 5.2.1

Implement training system to enhance employee performance and provide career growth
Increase Supervisor/Manager Training to 40 Hours of per year.

**ACTION PLAN**

- Actions Completed
  - Completed Electrician Matrix development

- Actions Planned
  1. Unveil Electrical Lab
  2. Continue matrix updates – HVAC underway
  3. Continued review of Leadership Development Matrix
  4. Develop compliance training and mission specific training metrics
GOAL #5 - Develop a valued, well-trained, motivated and diverse workforce

Strategy 5.2
Objective 5.2.2

Implement training system to enhance employee performance and provide career growth.
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

Facilities Management Strategic Planning Session - 4th Quarter FY 2011

Fiscal 2011 Results:
Goal 6,460 hrs
Actual 3,051 hrs (47%)
<table>
<thead>
<tr>
<th>Unit/Zone</th>
<th>4th Qtr</th>
<th>YTD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Design Services</td>
<td>5.3%</td>
<td>56%</td>
</tr>
<tr>
<td>Grounds</td>
<td>0%</td>
<td>4%</td>
</tr>
<tr>
<td>FIS</td>
<td>40%</td>
<td>88%</td>
</tr>
<tr>
<td>Steam Plant</td>
<td>80%</td>
<td>56%</td>
</tr>
<tr>
<td>Zone 7</td>
<td>103%</td>
<td>28%</td>
</tr>
<tr>
<td>Capital Projects</td>
<td>21%</td>
<td>75%</td>
</tr>
<tr>
<td>Housekeeping</td>
<td>29%</td>
<td>50%</td>
</tr>
<tr>
<td>Lock Shop</td>
<td>14%</td>
<td>11%</td>
</tr>
<tr>
<td>Zone 5</td>
<td>35%</td>
<td>20%</td>
</tr>
<tr>
<td>High Voltage &amp; Fire Alarms</td>
<td>0%</td>
<td>32%</td>
</tr>
<tr>
<td>Zone 1</td>
<td>45%</td>
<td>40%</td>
</tr>
<tr>
<td>Zone 6</td>
<td>15%</td>
<td>28%</td>
</tr>
<tr>
<td>Zone 2</td>
<td>0%</td>
<td>31%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Unit/Zone</th>
<th>4th Qtr</th>
<th>YTD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facilities Operations</td>
<td>45%</td>
<td>88%</td>
</tr>
<tr>
<td>Zone 4</td>
<td>48%</td>
<td>51%</td>
</tr>
<tr>
<td>Central Operations</td>
<td>20%</td>
<td>61%</td>
</tr>
<tr>
<td>Auto</td>
<td>91%</td>
<td>64%</td>
</tr>
<tr>
<td>Recycling</td>
<td>62%</td>
<td>77%</td>
</tr>
<tr>
<td>Planning/Architectural</td>
<td>256%</td>
<td>392%</td>
</tr>
<tr>
<td>Real Estate/Land Use</td>
<td>20%</td>
<td>155%</td>
</tr>
<tr>
<td>Business Office</td>
<td>152%</td>
<td>92%</td>
</tr>
<tr>
<td>AVC Office</td>
<td>253%</td>
<td>178%</td>
</tr>
</tbody>
</table>
GOAL #5 - Develop a valued, well-trained, motivated and diverse workforce

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

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

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

ACTION PLAN

• Actions Complete

• Actions Planned
  1. Develop plan for new Lunch and Learn Series
  2. Develop case for an FM Computer Training Lab
  3. Continue development of training matrix for trades positions
  4. PC skills training for infrequent users in preparation for Web Time entry
Facilities Management Strategic Planning Session - 4th Quarter FY 2011

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

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

Measure: Annual Employee Turn-over Rate

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

Turnover by Quarter

Annual Target – 14%

Q1: 1%
Q2: 2%
Q3: 2%
Q4: 4%

Status:

Lead FBO
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
  ✓ Revamped employee exit interview process – web-based

• Actions Planned
  1. Develop succession plan for management
Facilities Management Strategic Planning Session - First Quarter FY 2011

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

---

**FY 2010 Employee Overall Job Satisfaction**

- FY 2008: 84%
- FY 2009: 81.5%
- FY 2010: 86%
- FY 2011: 85%

Goal = 85%

Percentage

Fiscal Year

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY 2008</td>
<td>84%</td>
</tr>
<tr>
<td>FY 2009</td>
<td>81.5%</td>
</tr>
<tr>
<td>FY 2010</td>
<td>86%</td>
</tr>
<tr>
<td>FY 2011</td>
<td>85%</td>
</tr>
</tbody>
</table>
GOAL #5 - Develop a valued, well-trained, motivated and diverse workforce

<table>
<thead>
<tr>
<th>Strategy</th>
<th>5.3</th>
<th>Improve Employee Satisfaction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Objective</td>
<td>5.3.2</td>
<td>Achieve 85% Overall Employee Job Satisfaction on the Annual Employee Satisfaction Survey</td>
</tr>
</tbody>
</table>

**ACTION PLAN**

- **Actions Complete**

- **Actions Planned**
  1. Determine date for next survey
  2. Schedule next meeting with UI
Facilities Management Strategic Planning Session - Fourth Quarter FY 2011

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:  <=15

Balanced Scorecard Category:  Innovation and Learning Perspective/Learning and Growth
GOAL #6 - Promote Good Stewardship

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

ACTION PLAN

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

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

**LEARNING & GROWTH PERSPECTIVE**

<table>
<thead>
<tr>
<th>Perspective</th>
<th>Strategic Objective</th>
<th>Goal</th>
<th>Lag Measures/Lead Measures</th>
<th>Target</th>
<th>Actual</th>
<th>1st Quarter</th>
<th>2nd Quarter</th>
<th>3rd Quarter</th>
<th>4th Quarter</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Learning &amp; Growth</strong></td>
<td></td>
<td>How will we sustain our ability to change and improve?</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Develop high-quality staff</td>
<td>5.1.1</td>
<td>Reduce Vacancy Time Calendar Days</td>
<td>80 days/120 days</td>
<td>0 / 426</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Develop high-quality staff</td>
<td>5.1.2</td>
<td>Targeted Selection/Recruitment Training</td>
<td>100%</td>
<td>90%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>5.2.1</td>
<td>Supervisor (all levels of supervision) Training Hours</td>
<td>1720 hrs</td>
<td>53</td>
<td>Annual</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>5.2.2</td>
<td>Staff (non-supervisory) Training Hours</td>
<td>6460 hrs</td>
<td>47</td>
<td>Annual</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>5.3.1</td>
<td>Reduce Annual Turnover Rate</td>
<td>&lt;14%</td>
<td>4.0%</td>
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<tr>
<td></td>
<td>5.3.2</td>
<td>Overall Annual Employee satisfaction (No survey in 2010)</td>
<td>85%</td>
<td>N/A</td>
<td>Annual</td>
<td></td>
<td></td>
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<tr>
<td>Improve Employee Safety</td>
<td>6.4.1</td>
<td>Reduce Accidents by 10% annually (CY) - goal 15 or less</td>
<td>&lt;15</td>
<td>14</td>
<td>Calendar Year</td>
<td></td>
<td></td>
<td></td>
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</tbody>
</table>
Group Discussion
Directors Discussion