

Facility Project Process

PATHWAY TO SUCCESS - MEETING CLIENT EXPECTATIONS

Overview of the Process



Client Responsibilities

- Provides input on scope, schedule and budget for project
 - ✓ Scope: design and material preferences
 - ✓ Schedule: reasonable time frame for design & construction
 - ✓ Budget: adequate resources and potential senior manager sign-off
 - ➤ Budget for Design
 - Budget for Construction
- ☐ Identification of stakeholders, end users and ultimate decision makers
 - ✓ Ensure appropriate communication with all involved parties
 - ✓ Provide point of contact for project



Project Manager Responsibilities

- Communication
 - ✓ Permanent point of contact
 - ✓ Handles all conversations with internal and external parties
- Keeps client informed about all major steps and phases in the project
 - ✓ Communication of important and critical issues
 - ✓ Review meetings in all major phases
- Streamlined process and transparency
 - ✓ Clear process flowchart
 - ✓ Standardized forms and templates





Initial Client Project Meeting

- FM website to submit project request
 - ✓ Timely assignment of project # and project manager
- ☐ Initial consultation with project manager
 - ✓ Scope
 - ✓ Budget
 - ✓ Schedule



Projects / Construction

Engineering

Administration

Query / Find

Common Services

List of Services

Project Request

Space Request Vehicle Request University Vehicle Repair

Event Request Form Sinn Shop

Request

ONLINE SERVICES Bronco Fix-It

New Service Request

Operations

☐ If feasible, project moves into Design Phase



Excellence is the goal of WMU Facilities Management when providing our clients with the most cost effective and positive construction experience which we have based on tested industry standards and practices. To meet this objective, it is of prime importance that the entire process is understood by our clients, expectations are identified and communication is consistent and continuous between the client and Facilities Management. Recognizing the significance of proper communication, a project manager will be assigned at the beginning of each project and will remain the point of contact between the client and Facilities Management throughout all phases

In order to start a project the <u>Bronco Project Request Form</u> must be completed and submitted to the Facilities Management Department to have your project request placed in the system. After you submit your request, it will be reviewed and assigned to a Project Manager. This person will oversee and coordinate the project with you from start to finish, and communicate with you on a regular basis regarding the status of your project. If you do not hear from us within two business days or have any questions or problems, please contact Lori Bell at (269)387-8546 or Ron Robyn at

Project initiation will follow two basic tiers, each requiring the client to provide as much preliminary information as possible so the project can be properly assessed and



ordir Design

Feasibility & Design

- ☐ Agreement on budget, schedule and scope to complete design
- ☐ Project Manager creates collaborative team of client and design professionals to take vision and formulate the design details
- Meeting client expectations
 - ✓ Project Manager coordinates presentation of design document drafts for review to gather input from client
 - ✓ Client approves and signs off on design







Construction

Agreement on budget and schedule for construction phase

Project Manager coordinates construction schedule and process

Meeting client expectations

✓ Project Manager keeps client engaged and involved throughout project

✓ Client signs off at substantial completion of project with a punch list









Closeout

- □Complete punch list items
- □ CELEBRATION!!!
- ☐ Final review of project success
 - ✓ Client Feedback survey





Tracking Milestone Dates

Track & Measure



	Pro	Process Step	
Date	0	Client request	
Date	0	FM assigns project manager (PM), project number and informs client via e-mail	
Date	0	PM initial consultation on scope, budget and schedule	
		PM meets with engineering and architecture to create project team	
Date	0	PM receives approved design budget from client	
	0	Client and project team complete design	
Date	0	PM receives design approval from client	
		PM develops budget for construction phase	
Date	0	PM receives approved construction budget from client	
		Construction of project → finished construction	
Date	0	Client signs off at substantial completion with a punch list	



Client Involvement & Approvals

