
POLICY: II: 01—Planning and Scheduling
Procedure review - Annually

DATED: March 2000
UPDATED: September 2024

APPROVED: Executive Director of Facilities and Construction: _____

I. PURPOSE

To provide a high level of service to customers through a process of planning and scheduling that supports resource availability, space and equipment functionality through a clearly defined and managed backlog process.

II. DEFINITIONS

- A. Completion - A review within Work Control or Engineering of completed work orders to ensure work requirements have been met prior closing a work order or a project.
- B. AiM – Facilities Management (FM) work management system that manages and maintains data related to day-to-day operations and project management.
- C. Master schedule - Facilities Management's comprehensive and on-going schedule of work expectations.
- D. Repetitive work orders - Work orders that identify work processes repetitive in nature; equipment inspections and service, weekly housekeeping services, as well as event standby.
- E. Summer schedule - Comprehensive schedule that reflects construction/renovation and facility rebuild/replacement work as well as summer maintenance building sweeps and engineering projects.

III. RESPONSIBILITIES

- A. Executive Director of Facilities and Construction - Responsible for overall administration of the procedure.
- B. Directors and Managers - Responsible for the coordination of the FM master and summer schedule, review of backlog work orders and shop schedules. Directors and managers coordinate with the FM planners any long range planning issues, and participates in preparation of the summer schedule.
- C. Shop Supervisors – Responsible for managing the shop work schedule, coordinating with the maintenance planner scheduling issues related to customer notification, changes in the scope of work, and any resource constraints that would affect schedules. Shop supervisors are also responsible for the timely review and work flow of work orders.

- D. Managers and Shop Supervisors - Responsible for ensuring work requests that deal with space modifications and utilities replacement/upgrade use the "permit process" to ensure applicable code requirements are included, documented, reviewed and approved before work is initiated. Permits are to be routed to Engineering for review and approval.
- E. Director of Engineering and Construction - Responsible for managing construction and renovation requests and participates in preparation of the master and summer schedule.
- F. Planners/Schedulers - Responsible for the implementation and coordination of planning and scheduling, updating the master schedule to reflect short- and long-term plans. In addition, planners develop the comprehensive summer schedule and schedules projects or work during campus closures or holidays.
- G. Maintenance Planner – Responsible for reviewing estimate requests and evaluating the scope of work, ensures estimates are approved/not approved, coordinates with the customer and the technicians responsible. The maintenance planner also evaluates the maintenance backlog and follows up on the schedule based on priority and customer requirements.
- H. Work Control Supervisor -Responsible for the day-to-day operation of the Work Control Center, manages the repetitive and standing work order distribution, reviews work order data for accuracy of craft/crew to ensure data integrity is maintained. Manages departmental requests in a timely manner.
- I. Work Control Coordinators - Responsible to review work requests, notifying technicians of emergency and critical priority requests in a timely manner in order to respond to critical issues, generating work orders in a timely manner and responding to customer questions on work orders. Requests requiring scheduling will be routed to the planner(s) for processing.
- J. Shop Technicians - Responsible for ensuring work schedules are followed as they relate to priorities, notify the shop supervisor and planner(s) if schedules need to be adjusted, and ensures completed work order status is changed on a routine basis to ensure the backlog review work schedules are current.

IV. PROCEDURE

- A. Customer requests are submitted to the Work Control center for processing through the AiM system or by phone.
 - 1. Work Control Coordinators shall notify trades staff of "emergency" and "critical" priority requests to ensure a timely response to critical issues. Work orders are generated to enable the issue of materials and labor charges.
 - 2. Work Control Coordinators will transfer requests that require estimates to the Maintenance Planner.
 - 3. System process completion consists of review of work orders by Work Control staff in "approved" status to ensure labor has been entered and charged to the correct labor type (E&G or Aux). Work order status is then changed to "closed"
- B. Planner(s) will evaluate requests and process a work order with a status of "in-planning". Planner(s) will then:

1. Define scope of work.
 2. Identify resource availability.
 3. Obtain a cost estimate from the required shop supervisor.
 4. Submit the estimate to the customer by email notification. The status of the work order phase will be changed from "in-planning" to "estimate processed."
 5. If the estimate is approved, the planner will change the status to new and distribute phases to the shop(s) involved.
 6. Shop Supervisors or manager(s) will notify the planner that work is ready to be scheduled.
 7. The planner will notify the customer and, in conjunction with the project manager, schedule the work.
- C. If the estimate is not approved, the work order will be closed and customer will be charged for the estimate only.
- D. Customer generated project requests are routed through the Work Control center for identification and review.
1. Engineering staff and facilities managers will review the scope of the work, determine if particular requests qualify for "in-house" completion, and issue necessary permits.
 2. Planner(s) will route work orders that identifies the scope of work and route to Engineering or maintenance for an estimate.
 3. If estimates are approved, work orders will then be sent to appropriate shops with documentation of the approval.

V. TRAINING

The Work Control Manager and Work Control Supervisor will coordinate planning and scheduling training needs.