



# CLIENT PERSONA

## KATHY MONTGOMERY

ASSOCIATE DIRECTOR OF  
CAPITAL PROJECTS

MIDWEST UNIVERSITY

PLANNING | ARCHITECTURE | ENGINEERING

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### ABOUT KATHY

#### Employment Experience:

Midwest University, *Associate Director of Capital Projects* (2006 - Present)

Architectural Design Firm, *Project Architect* (1993-2006)

Samples R Us  
*Architectural Sales Representative*  
(1988-1990)

#### Education:

Midwest University, *Masters of Architecture*  
(1990-1993)

#### Certifications and Organizations:

Licensed Architect, State of Ohio  
Member - American Institute of Architects

#### Recent Projects:

Midwest University - College of Arts & Science  
Renovation  
Midwest University - Student Residential Hall  
Midwest University - Dining Commons

#### LinkedIn Profile:

<https://www.linkedin.com/in/kathy>

### ABOUT MIDWEST UNIVERSITY (From the website)

Physical Facilities maintains 2500 acres of grounds and approximately 8 million square feet of building area. The department consists of Planning Architecture, and Engineering, Operations, Utility Enterprise Auxiliary, Environmental Health & Safety Office, the Airport, the Sports Event Center, and Recreation Sports.

If education is to flourish, the University buildings and grounds must be attractive, clean, safe, and energy efficient. Our goal is to provide excellence in service and maintain the campus and facilities at the high standard that is exemplified by the Midwest tradition of excellence.

Through the efforts of over 500 dedicated employees, the department maintains 2500 acres of grounds and approximately eight million square feet of building area. Included in this maintenance effort are approximately 9000 trees, 76 acres of parking area, and 32 miles of walks. The department consists of Planning Architecture, and Engineering, Operations, Utility Enterprise Auxiliary, Environmental Health & Safety Office, the Airport, and the Sports Event Center and Recreation Sports. The Department also assists in the maintenance and operation of three additional regional campuses.



## INTERVIEW RESPONSES - 6/21/18

### ABOUT KATHY

#### Tell me about your role?

- I manage a group of Project Managers that manage University capital projects.
- I am involved at high level within the facilities department at the University.
- I have 9 employees who report to me.
- Our group manages close to \$500m of work.

#### What does Kathy personally care about?

- I care about creating a balance between everything on my desk that will achieve the best result for Midwest.
- How I handle my people, design reviews, whatever... achieves the best result for Midwest.
- Cost effective measures is not just one thing... it's a balance.
- Making sure that the legacy of the architecture of the buildings is maintained.
- Serving the needs of the students.
- Making sure the facilities are impactful for the effort.

### ABOUT MIDWEST UNIVERSITY

#### What is Midwest's brand? What does University Facilities care about?

- Traditional in style, yet in substance the University strives to be current with programs and important initiatives that drives business and gives students a reason to attend.
- Architecturally, our brand equals: beautiful space, Georgian architecture, green space, and landscape. The landscape and architecture serve as brand elements for Midwest University.

#### What space does your university occupy among other universities?

- Feeling that students, staff, parents get when they walk on campus.
- The architecture, campus planning, gives students, staff, and parents the feeling that they are in college.
- The style gives them that initial feeling that 'I'm where I'm supposed to be'.

#### What does the University provide to attendees? Employees?

- With academic buildings and dining facilities you get a ton of stakeholders.
- User group goal setting sessions are a VERY common practice.
- Architects are hired and responsible for leading that effort.
- Some architects do more visioning than others.
- There are committees of users who review documents and offer end user perspective in their feedback.
- The team meets with them periodically as they move through the design process.

#### Who are your clients?

- EVERY group on campus. Everyone has needs.
- I live with my clients every day. Good or bad.
- The project doesn't end. Relationships with end users never end.

#### What does your ideal client look like?

- Someone that has a clear vision for what they want the facility to be and that understands the budget impacts that they request.
- One that understands that change is going to occur throughout the design process.
- Communicative, open, and honest communication throughout to make decisions moving forward.

#### What are you and your department best known for?

- Pulling off miracles.
- We manage a high dollar volume of construction with only 6 Project Managers.
- We are known for being able to make miracles happen because of our highly experienced and committed staff.



## INTERVIEW RESPONSES - 6/21/18 ABOUT MIDWEST UNIVERSITY (cont'd.)

### Where do you see the University in 5-10 years?

- Midwest will continue to be a vibrant and evolving University that will continue to grow.
- We will continue to grow student population, academic programs, and provide a high level of graduates to the Ohio economy.
- There will be a need for more flexible uses of space.
- Existing space will be opened up for more uses.
- More generic lab spaces will be created.
- Student living spaces will have more amenities.
- All University spaces will be more student driven.

### What is/would/could disrupt the your business?

- Economic downturn.
- Any kind of act of God due to weather, etc.
- Enrollment decreases effects staff.
- Labor shortages, high cost of materials, and political changes.

### When are you (or a project) at your best?

- When there is SYNERGY among the team.
- When everyone understands the vision and is working together to achieve that, especially when a project is in construction.

### To gain knowledge in what you and others at the University do, what industry publications/sites/conferences do you read and or attend?

- Conferences: SCUP and Tradeline are the biggest conferences that our team attends.
- Publications: College Planning and Management, Facility Manager, and I still pay attention to AIA.

### What keeps you up at night (work related)?

- Usually, it is making sure that the construction projects are completed on time.
- We have students who are coming, need a place to study, stay, etc. 99% of the time we are complete and ready for the semester, but not without effort.
- We try to catch issues early to keep a project on schedule.

### Do you try to incorporate women-owned, EDGE and WBE firms in your selection process?

- Diversity.
- We have a goal that is more than the State's required 5%, Our goal is currently 7%.
- We encourage this among our teaming partners and within the University.
- We ask CM's about their dedication and commitment to outreach programs.
- We recommend that small, disadvantaged firms work with partners who have experience with the University to help build their resume and portfolio.
- We also rely heavily on references provided.

### What do you look for in a proposal submission?

- The best alignment with our project vision.
- Does their portfolio match the type of project? We are looking for the most relevant project experience from proposers.

### What does the ideal AEC partner look like?

- When we hire, we are looking at hiring a partner
- Someone who understands the goals.
- Shares in the leadership of projects with us.
- We do not expect a reflection of our project verbatim, but come to us and say "I hear what you're saying, but... here's what's trending what could better for your vision."
- Partners who are proactive in expanding their knowledge and ours.

### What is your expectation for responsiveness from teaming members (ie. 24 hours)?

- Responsiveness is everything during construction. Any time during the day or night if it's needed.

