**LIMITED SCOPE AGREEMENT**

Guidelines and Best Practices:

This form is for use on projects **UNDER $2M**.

The Planning & Project Management Planner, Project Manager, or Coordinator is responsible for filling out this form, having it signed by the department, and submitting it along with the PEF for the preliminary planning fund and the full funding requests. It is best practice to reissue the form when the project scope, budget, funding, key project members, or communication plan has changed.

If the project is jointly funded or managed by BJH or SLCH, the [Joint Approval Form](https://facilities.med.wustl.edu/app/uploads/2025/02/Joint-Approval-Form_rev-02.11.25.xlsx) with appropriate signatures is also required.

If the project is Dean-funded, OFMD is the requestor, and the identified project team member shall issue the request, while OFMD Business Operations is the approver.

Once signed, the Planner/PM/Project Coordinator will distribute this document to the applicable Integrated Campus Planning & Operational Services project support team members and departmental contacts.

The PM/Planner should summarize the project intention in the ***Purpose of Project*** section, including the strategic objective that ties back to the current departmental planning.

The ***Scope of Work*** section should include a detailed description of the project requirements and specific exclusions.

If any projects or activities are required before this project can begin, please mention them and the estimated substantial completion date in the ***Enabling Projects*** section.

Under the ***Project Support Team and Communication Plan*** section, the PM/Planner should highlight the applicable integrated planning and project team members. They are to choose biweekly or monthly as the frequency of sending the team project status updates. When a department funds a project, the business manager must be copied on all project communications that affect project scope, schedule, and funding.

To:

From:      , Project Manager (or Planner)

Date:

This letter documents the project’s purpose, scope, schedule, budget, funding source, and communication plan.

|  |  |
| --- | --- |
| Project Name |  |
| Project Number or ServiceNow Task Order Number |  |
| Project NASF |  |
| Building Name |  |
| Building Floors/Rooms |  |
| Building Address |  |
| Building Ownership |  |

# Purpose of Project

# Scope of Work

**Exclusions:**

# Enabling Projects

# Project Schedule

Estimated target project start date:

Estimated target construction start date:

Estimated target substantial completion date:

Total duration is       working days.

# Project Budget

Total Estimated Project Cost: $

$/NASF: $

The final Total Project Cost may increase if change orders are requested or the bid acceptance exceeds 30 days. If the bid acceptance exceeds 30 days, an updated estimate will be provided to the customer for review and approval before initiating any new work.

This estimate is valid until 30 days from the date of this letter.

A budget worksheet is attached for your information.

# Response

If you wish to proceed, please provide the appropriate funding information requested below, sign, and return this form to me.

Please contact me with any questions regarding this estimate.

I wish to proceed with the noted scope of work.

I do not wish to proceed with the above-noted work.

Total amount approved: $

Source of funds:

Cost Center Information:

|  |
| --- |
| Org (REQUIRED) |
| Account |

|  |  |  |
| --- | --- | --- |
| Requestor Name | Phone | Email |
| Requestor Signature | | Date |

# Project Support Team and Communication Plan

Once signed, the Planning & Projects Planner/PM/Project Coordinator will distribute this document to the following Integrated Campus Planning & Operational Services project support team members, the departmental Business Manager, and other contacts as specified.

The Planner/PM/Project Coordinator will also provide project status report updates on a  basis.

Department Business Manager:

Primary Department Contact (if different than above):

Primary OFMD Contact:

|  |  |  |  |
| --- | --- | --- | --- |
| Functional Area | Name | E-mail | Applicable  (Y/N) |
| Project Accountant |  |  | Y |
| Project Contracts |  |  | Y |
| Planning & Projects Project Coordinator |  |  | Y |
| Planning & Projects Project/Dept. Planner |  |  | Y |
| Planning & Projects Project Manager |  |  | Y |
| Planning & Projects Team Lead |  |  | Y |
| Planning & Projects Sr. Director | Elizabeth Kohl | elizabeth.kohl@wustl.edu | Y |
| Planning & Projects Relocation & Interiors | Hannah Jefferies | hannah.jefferies@wustl.edu |  |
| Facilities Engineering | Mark Hume | humem@wustl.edu |  |
| Facilities Engineering | Jeff Schimek | schimek@wustl.edu |  |
| Building Technician |  |  |  |
| Environmental Services | Mario Turner | turnerlc@wustl.edu |  |
| Transportation & Parking | Michelle Lewis | lewismichelle@wustl.edu |  |
| Key Shop/Access Control | Justin Orrick | justin.orrick@wustl.edu |  |
| Landscape & Public Realm | Allan Miller | allan.miller@wustl.edu |  |
| Real Estate | Ryan Haas | ryanhaas@wustl.edu |  |
| Furniture & Design | Audrey Metz | audreymetz@wustl.edu |  |
| EH&S – Occupational Safety | Brad King | kingb@wustl.edu |  |
| EH&S – Biological Safety | Susan Cook | shcook@wustl.edu |  |
| EH&S – Chemical Safety | Angela Dartt | adartt@wustl.edu |  |
| BJC Infection Control | Misha Foster | misha.foster@bjc.org |  |
| EH&S – Environmental Compliance | Linda Vishino | vishinol@wustl.edu |  |
| EH&S – Radiation Safety | Dan Doenges | daniel.doenges@wustl.edu |  |
| DCM | Dr. Ken Boschert | boschertk@wustl.edu |  |
| TFC | Michael Leyden | michael.leyden@bjc.org |  |
| WU IT | Lee Rouse  Tony Phillips | rousel@wustl.edu  phillips.a@wustl.edu |  |
| WU AV | Boyd Pickup | boyd.p@wustl.edu |  |
| DAS Systems | Renne Brewer | renne.brewer@bjc.org |  |