

Applies to: All Operations & Operations & Facilities Management Department Employees

GUIDELINES:

Issued: February 2, 2015

Revised: March 6, 2018

PURPOSE:

To establish guidelines that ensure all Operations & Facilities Management Department employees understand the process of reviewing and updating the Project Delivery Manual and corresponding documents.

DEFINITIONS:

Document Owner – Person(s) who manages and “owns” the document in the manual and is responsible for making all changes to the document and submitting for review and approval prior to revised distribution

GOAL:

The goal of the Project Delivery Manual (PDM) is to improve understanding and communication among all stakeholders by clearly identifying the roles and responsibilities of the various team members, as well as the processes and controls expected at each phase of the project.

This manual serves as a comprehensive summary of the approved PDM processes, procedures, tasks, and tools involved in initiating, managing and completing a facilities improvement project at Washington University School of Medicine (WUSM). There are embedded links throughout this document that will allow the customer and Planner/PM to link directly to tools, information and guidelines and the links provided should be utilized at all times to ensure the most current and up to date information is utilized.

The PDM will assist in educating new and existing Operations & Facilities Management Department (OFMD) staff and serve as a day-to-day reference for OFMD personnel. It is also designed to facilitate communication with internal and external stakeholders interested in understanding OFMD’s processes for the design and construction of their projects. The PDM will be reviewed annually, and revised to address the evolving needs, processes and policy of the University.

Processes presented in this manual are a guide but variances in the sequence of activities may be required due to unique project circumstances.

PROCESS:

On a yearly basis, the Capital Projects, Physical Planning, Business Operations and Facilities Operations teams will review the [Project Delivery Manual](#) and its corresponding documents. It may be necessary to discuss the documents with others from different areas/departments.

After careful review and updates, the manual should be forwarded to the Director of Capital Projects and the Assistant Vice Chancellor, Assistant Dean for Facilities for final review. Once the Director of Capital Projects and

the Assistant Vice Chancellor, Assistant Dean for Facilities reviews the manual and approves it, they should then send the document to the Planner, Communication & Strategic Planning to include in the manual and update on the OFMD website.

If a document requires changes at other times during the year, the document and an explanation of changes should be forwarded to the Director of Capital Projects for review. Once approved by the Director of Capital Projects, the document should be updated by the Document Owner. Once the document owner makes the changes, the document should be sent to the Planner, Communication & Strategic Planning to include in the manual and update on the OFMD website.

The Planner, Communication & Strategic Planning will then fill out the Document Change Form and will send it to the Capital Projects, Physical Planning, Business Operations and Facilities Operations teams.

Also, on a yearly basis, the Capital Projects and Physical Planning Teams will have a re-training of the manual and its documents to all the appropriate staff (Planners, Project Managers, etc.) in Capital Projects and Physical Planning.