*[PROJECT NAME]*

OPERATIONS AND MAINTENANCE MANUAL

Version *X.X*

*[DATE]*

VERSION HISTORY

|  |  |  |  |  |  |
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| **Version #** | **Implemented**  **By** | **Revision**  **Date** | **Approved**  **By** | **Approval**  **Date** | **Reason** |
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# EXECUTIVE SUMMARY

## Purpose

*[Provide a description of the purpose of the O&M Manual, its intended audience, how it should be used, and by whom.]*

# FACILITY DESIGN AND CONSTRUCTION

## General Facility and Systems Description

*[Provide an overview of the intent for design and use of the facility. Include the Consolidated RFP in this section along with any Modifications and Amendments. Detail the overall dimensions of the facility, number of floors, foundation type, expected number of occupants, and facility Category Code. List and generally describe all the facility systems and any special building features (for example, HVAC Controls, Sprinkler Systems, Cranes, Elevators, and Generators). Include photographs labeled to show key operating components and the overall facility appearance.]*

## Basis of Design (BOD)

[Insert the final copy of the BOD document.]

## Contract Specifications

*[Insert the final copy of the Contract Specifications.]*

## Facility Data Workbook (FDW)

*[Insert the final copy of the FDW.]*

## Warranty Management Plan (per 01 78 00)

*[Insert the final copy of the Warranty Management Plan as outlined in UFGS 01 78 00 CLOSEOUT SUBMITTALS.]*

## Room Inventory

*[Provide a complete list of rooms and named spaces. Include spatial data defining actual net square footage and data of each room. Also include the room finish schedule including room names and numbers. Provide all schedules in the design drawings in the room inventory and add a column to each schedule to record what was provided by the contractor during construction.*

*Provide a list of installed equipment furnished under this contract. Include all information usually listed on the manufacturer’s name plate. Include, as applicable, the following information for each piece of installed equipment: description of the item, location by room number, model number, serial number, capacity, name and address of equipment supplier, condition, spare parts list, manufacturer’s catalog, and warranty.]*

# FACILITIES, SYSTEMS, AND ASSEMBLIES’ INFORMATION

*[Bookmark information in this section using the current version of Uniformat II, UFGS numbers, and document type as outlined in the example below. Each item up to the third level (i.e. B2030110) should have a bookmark/tab for easy navigation of the manual.]*

## A10

## A20

## B10

## B20 - EXTERIOR ENCLOSURE *(example)*

3.4.1 B2030 - EXTERIOR DOORS

3.4.1.1 B2030110 - GLAZED DOORS

3.4.1.1.1 Specifications *[Located in Part 2 of this manual; do not include again.]*

* + - 1. UFGS 08 11 16 – Aluminum Doors and Frames
         1. Associated approved submittals
         2. Warranties
         3. Etc.
      2. UFGS 08 71 00 – Door Hardware
      3. UFGS 08 81 00 – Glazing

3.4.1.1.2 Manufacturer’s Operations and Maintenance Data (Exterior Doors)

3.4.1.1.3 Approved Submittals (Exterior Doors)

3.4.1.1.4 Coordination/Shop Drawings (Exterior Doors) *[as applicable]*

3.4.1.1.5 Sequence of Operation for Operating Equipment

3.4.1.1.6 Routine Maintenance Requirements

3.4.1.1.7 Repair Procedures

3.4.1.1.8 Emergency Procedures and Locations of Applicable Controls

3.4.1.1.9 Warranties (Exterior Doors)

3.4.1.1.10 Record Drawings and Utility Systems (as applicable)

3.4.1.1.11 Contractor / Supplier Listing and Contact Information

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| --- | --- | --- | --- |
| **Contact Information - Subsystem** | | | |
| Email | Company Name | Website | Phone  Number |
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## B30

## C10

## C20

## C30

## D10

## D20

## D30

## D40

## D50

## E10

## E20

## F10

## F20

## F30

## G20

## G90

# SYSTEM USAGE

## Facility Guide By System

*[Insert a copy of the completed facility operating plan.]*

## Maintenance Plans, Procedures, Checklists, Records, and Spare Parts Inventory

[Insert procedures, forms, and checklists for facility O&M.]

## Maintenance Schedules

[Include recommended maintenance schedules for systems and equipment along with updated requirements.]

## Ongoing Commissioning (Cx) Operational and Maintenance Record Keeping

[Include ongoing Cx and optimization procedures and documentation to monitor and improve the performance of facility systems.]

## Janitorial and Cleaning Plans and Procedures

[Insert a copy of the facility cleaning and janitorial plan with procedures and intended chemicals and equipment.]

## Utility Measurement and Reporting

*[Include utility schematic diagrams, enlarged connection and cutoff plans, description of utility metering and monitoring systems, procedures for tracking utility use and reporting, and one-line diagrams and meter locations of systems.]*

# TRAINING

## Training Plans and Materials

[Insert a copy of training plans used for each type of equipment, along with training materials used, arranged in specification sequence.]

## Training Records

[Insert copy of training records, sign-in sheets, etc.]

## System Manual Maintenance and Documentation

[Include training and documentation on the updating and continued use of the Systems Manual.]

# COMMISSIONING (Cx) PROJECT REPORT AND TAB REPORT

## Commissioning (Cx) Plan

[Insert the final Cx Plan and completed Cx report with evaluation and testing forms and records for each building and system.]

## Testing and Start-up Reports

[Insert relevant commissioned system assemblies test reports including the installers checklists of assemblies.]

## Cx Progress Reports

[Insert a copy of all Cx Progress Reports.]

## Issues and Resolution Logs

[Insert a copy of all issues and resolution logs with resolution or status of each item.]

## Item Resolution Plan for Open Items

[Insert a list of any open items and seasonal or additional testing required.]

# REGULATORY REQUIREMENTS

[Enter information describing regulatory and policies compliance requirements or provide a reference to where it is stored.]

# PERMITS

[Enter information requiring frequently asked questions and associated answers or provide a reference to where it is stored.]

# OPERATIONS AND MAINTENANCE MANUAL APPROVAL

The undersigned acknowledge they have reviewed the *<Project Name>* **Operations and Maintenance Manual** and agree with the approach it presents. Changes to this **Operations and Maintenance Manual** will be coordinated with, and approved, by the undersigned or their designated representatives.

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