



PROJECT RESPONSIBILITY SCOPE MATRIX

Project Name:

Date Prepared:

Task	XYZ Client/Business Unit	XYZ CRE/FM	Design Professionals	Construction Manager	General Contractor	Other	Comment
Project Initiation							
Submit Project Requirement to FM CRE/FM	O						
Task facility requirements and funding	O,P	C					
Prepare Design SOW		O					
Select Design Consultant		O					
Prepare Design Consultant Task Order		O					
Select Construction Manager		O					
Prepare Const Mgr Task Order		O					
Site Selection and Lease							
Task Real Estate Transactions to initiate site search	A	O,P					
Task Leasing Agent to Search	A	O					
Review preliminary list	C	O,P					
Task short list search		O,P					
Select Site	C	O,P					
Preliminary Design Phase							
Pre-Design Meeting; minutes, set schedule	C	O	C	P			
Prepare Project Directory		O		P			
Cost Control System		O		P			
Schedule Control System		O		P			
Program Management Information System		O		P			
Correspondence Control System		O		P			
Weekly Progress and Budget Status Report		O		P			Weekly mtgs intended for FM CRE/FM, A/E and CM
Develop a Project Action Plan		O		P			
Develop Project Program	C	O	P	C			
Obtain Preliminary Project Data; Site & Building survey, borings, as-built drawings, etc.		O	P				
Apply for & track all Regulatory Permits		O	P				
Schematic and DD Phases							
Confirm Availability of:							
Sanitary Service							
Storm Water							
Domestic Water							
Gas Service		O	P				
Fire Service							
Electric Service							
Telephone Service							FM to Assist
Security Service							FM Security to Assist
Prepare Construction Cost Estimate		O	C	P			
Maintain / Update Design Schedule		O	P	C			
Provide Info on Owner purchased Equipment		O	P	C			
Prepare & Submit Initial Budget/Schedule		O	C	C			
Review Initial Budget / Schedule, consolidate & resolve all comments		O	C	P			
Approve site and Initial Budget/Schedule	A	O					
Identify Long Lead Items, prepare orders		O	C	P			
Prepare & Submit 50% Design		O	P	C			
Review/Approve 50% Design		O	P				
Order Long Lead Items		O	C	P			
70 % Design Document Phase							
Determine Contracts to be Awarded		O,P	C	C			
Prepare 70% Plans		O	P				
Prepare Specifications Outline		O	P				
Prepare Structural Calculations		O	P				
Prepare HVAC Cal & Narrative		O	P				
Submit 70 % Documents		O	P				
Review 70% Documents, submit comments	C	A	P	C			
Review submittals, shop dwg. requirements list		O	P	A			
Consolidate comments; send to DP		O		P			
Review & Approve 70 % Documents	C	O	P				
Update Design Schedule	C	O	P	C			
Submit Design for Building Permit Review		O	P				
95 % Design Submittal Phase							
Obtain Code Review Approval		O	P			Code official	
Submit Design Drawings		O	P				
Submit Specifications		O	P				
Submit Draft Contract and all attachments		O	P				

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Review Documents, compile, and submit final comments	C	O	C	P			
Review & Approve 95 % Documents	C	O		P			
Review Plans for Constructability, & Criteria		O		P			
Value Engineer Project		O		P			
Develop General Contractor Bid List	C	O	C	P			
Resolve and incorporate All Comments		O	P				
Prepare Bid Documents, 100%		O	P	C			
Track All Permits		O	P	C			
Track All Project Documents		O	C	P			
Presentations at Public Hearings		O	P	C			
Evaluate A/E Performance		O		P			
Evaluate A/E Invoices		O		P			
Authorize A/E Invoice payment		O					
Approve CM Invoices		O					
Maintain Financial Tracking		O		P			
Bid / Award Phase							
Submit Bid Documents to FM Sourcing		O	P	C			
Review & approve bid documents		O,P				FM Sourcing	
Distribute Bid Documents		O		P			
Pre-Bid Conference		O		P			
Prepare & Distribute Minutes		O		P			
Attend Pre-Bid Conference	C	O	C	P	C	C	
Prepare Addenda		O	P	A			
Review & approve addenda		O	P	C		FM Sourcing	
Publish and Issue Addenda		O	P			FM Sourcing	
Schedule & Coordinate Bid Openings		O		C		FM Sourcing	
Receive, Open & Record Bids		O		C		FM Sourcing	
Review Bids and Provide Cost Analysis		O		C			
Review & approve Sub-Contractors		O		P			
Determination of Award	C	O		P			
Prepare Contracts - Validate Blanket Agreements		O		C			
Sign Contracts		O		C		P, FM Sourcing	
Distribute Signed Contracts		O		C		P, FM Sourcing	
Issue notice to proceed		O		C		P, FM Sourcing	
Prepare Design Consultant Performance Evaluation		O		P			
Construction Administration Phase							
Approve Contractor's Schedule	C	O	C	P	C		
Review/Approve Contractor Schedule of Values Breakdown		O	C	P			
Pre-Construction Meeting	C	O	C	P	C		
Manage RFI process	C	O	C	P	C		
Submit Change Request	C	O	C	C	P		
Evaluate/Negotiate/Recommend Change Request		O	C	P	C		
Change Orders	C	O		P			
Track & Distribute Documents		O		P			
Review/Approve submittals		O	P	C			
Approve Shop Drawings		O	P	C			
Approve Test Reports		O	P	C			
Prepare Change Request Plans & Specs		O	P	C			
Weekly Project Progress Meetings		O	C	P	C		A and E Disciplines req'd at weekly Progress Mtgs.
Review Contractor's Progress Schedule		O		P	C		
Evaluate / Recommend Contractor Invoices		O	C	P			
Field inspections		O	C	P			
Meeting Minutes and Budget Status Reports		O		P			
Submit Daily Field Reports		O		A	P		
Construction Photographs		O		P/C	P/C		
Prepare "As-Built" Plans		O		C	P		
Prepare O&M Manuals		O		C	P		
Coordinate Substantial Completion		O	C	P			
Substantial completion certificate		O	C	P			
Project Close Out Phase							
Conduct prefinal inspection		O	P	C	C		
Prepare / consolidate Punchlist(s)		O	P	C			
Coordinate Code Inspection		O		C	P		
Complete Punchlist Items		O		C	P		
Verify Completion of Punchlist Items		O	P	C			



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Plan, Schedule & Control Final Inspection by All Parties Incl. Regulatory Agencies		O	C	C/P	P/C		
Site commissioning	C	O	C	C	P		
Coordinate Equipment Operation Training		O		P			
Provide Maintenance & Operating Manuals		O	C	C	P		
Provide All Guarantees & Reports		O		A	P		
Assemble & approve Close-Out Documents		O		P	C		
Evaluate As-Built Plans		O	C	P			
Prepare Record Set Drawings		O	P		C		
Sign "Certificate Of Final Completion		O	P	A			
Close-Out Design Consultant's Contract		O		C			
Final Contract Acceptance		O		P			
All Permit closeouts		O		A	P		
Occupancy certificate		O		A	P		
Post Occupancy Phase							
Provide Post-Occupancy Assistance		O		C			
Correct Warranty Issues		O		A	P		
Update FM Design Standards		O	P	C			
Lessons Learned		O,P	C	C	C	C	