

PROJECT MANAGER and TECHNICAL LEAD ROLES and RESPONSIBILITIES CHECKLIST

PROJECT PROGRAM TYPE: _____ DATE: _____

PROJECT NAME: _____

PURPOSE: This Checklist is to aid in the coordination and discussion of the project roles and responsibilities between a Project Manager (PM) and Technical Lead (TL). The "typical" role has been pre-selected on the Checklist, however the PM and TL should change the role as best fits the project type, project scope, and expertise of the PM and TL. This list of project Tasks is not intended to be all-inclusive, nor is it applicable to all projects.

ADDITIONAL INFORMATION: Refer to the Checklist Guidance document for a more comprehensive description of the Tasks below. At the end of each section there are several blank lines where additional tasks can be inserted and a corresponding dropdown. The Checklist is to be used as a guide and can be modified to accommodate the project. The noted tasks are not necessarily in sequential order, but are intended to mostly follow the MilCon design process.

PM:		TL:		
RACI CHART KEY				
R	RESPONSIBLE. The person who actually completes the task and performs the work.			
A	ACCOUNTABLE. The person ultimately accountable for the work or decision being made. The person who is the "owner" of the work. This person delegates work and is the last one to review the task or deliverable before it is deemed complete.			
C	CONSULTED. Anyone who must be consulted with (or provides support) prior to a decision being made and/or the task being completed.			
I	INFORMED. Anyone who must be informed when a decision is made or work is completed.			
TASK	PROJECT MANAGER	TECHNICAL LEAD	RESOURCE MANAGER	
Project Initiation				
1. Initiate Project in P2				
2. Establish seed funds for project initiation tasks				
3. Identify and confirm required disciplines for PDT				
4. Develop Preliminary Project Management Plan: Develop Preliminary Scope, Schedule and Budget				
5. Develop the project quality management plan (QMP) and quality control plan (QCP)				
6. Initial Installation Planning Meeting				
7. Planning Meeting Report				
Project Planning (post Charter)				
8. Define Basic Scope				
9. Initiate Execution Strategy - Acquisition Strategy Meeting				
10. Establish critical milestones and constraints				
11. Identify and Engage USACE Centers of Standardization (COS) and Centers of Expertise (CX)				
12. Engage Division or District Sustainability SME				
13. Confirm commissioning approach				
14. Request resources for scoping				
15. Request Planning and Design Funds (P&D)				

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16. Value Engineer (VE) Screening			
17. Initial Team BET and Schedule Development			
18. Initial Design Team BET for Technical Resources			
19. Data Management Set up - Project Files			
20. Data Management Set up - Technical Files (Geospatial, etc.)			
21. Data Collection and Document Review			
22. Define External Capabilities Required			
23. Identify A-E support requirements			
24. Prepare Design Review Plan			
25. Identify design criteria and project requirements			
26. Kickoff Meeting (PM, TL, key PDT members)			
27. Update and Finalize Scope, Schedule and Budget (BET)			
28. Prepare and Submit the PMP for Approval			
29. Setup Labor, PR&Cs, Travel (in-house)			
30. Army Standard or Standard Design/Criteria Waiver (if needed)			
31. Engage with Archeology			
32. Engage with Real Estate			
33. Engage with Environmental			
34. BIM Kickoff meeting, prepare Project Execution Plan (PxP)			
35. Organize a site visit			
36. Design Charrette - Scheduling			
37. Design Charrette - Design Presentation			
38. Acquire names of reviewers - DQC			
39. Acquire names of reviewers - ITR/ATR			
40. Acquire names of reviewers - BCOES			
Project Design			
41. Plan and host PDT meetings			
42. Meeting minutes			
43. Communicate with Client, Regional Representative and Stakeholders			
44. Preparation of the Project Definition Report (PDR)			
45. Setup/Conduct Value Engineering Study			
46. Preparation of ENG Form 3086 (Current Working Estimate)			
47. Maintain P2 information (PM delegates to project scheduler)			
48. Change Management - Document changes to (S,S,B)			
49. Document changes to PMP			
50. Track project status and execution (financials)			
51. Track project status and execution (deliverables)			
52. Track project budget and report it to the team			
53. Report on project status to DB			
54. Report on project status to PRB			
55. Register project for sustainability third party certification by 35% design			
56. Ensure VE Study is incorporated			

Project Name:

57. Verify permit requirements			
58. Coordinate product deliverables (for different design phases)			
59. Coordinate Interference Management Meetings			
60. Coordinate Design Reviews			
61. Monitor DR.Checks for resolution			
62. Coordinate the CSRA meetings with the Cost Engineer			
63. Coordinate periodic sustainability meetings to track compliance			
64. Develop Current Working Estimate (CWE)			
65. Prepare the Engineering Considerations and Instructions for Field Personnel (ECIFP)			
66. Ensure front end specifications are included in 95% package			
67. Coordinate a submittal register coordination meeting			
68. Confirm district quality control review is properly performed			
69. QC Certification			
70. Confirm BCOES and ITR reviews are completed			
71. Oversee compilation of the final contract documents			
72. BCOES routing			
73. Coordinate completion of AT/OPSEC Coversheet			
74. Develop and Route Form 1			
75. Request Authority to Advertise			
76. Coordinate completion of Draft DD1354			
Project Acquisition			
77. Advertise			
78. Answer KTR RFI's during Bid/Proposal Process			
79. Verify completion of the IGE			
80. Setup Source Selection Evaluation Board (SSEB) (if used)			
81. Review/Evaluate Bid/Proposal			
82. Request Authority to Award			
83. Assemble the as-awarded contract documents			
84. Coordinate Third Party Certification design review			
Project Construction			
85. Participate in meeting with construction to review the ECIFP			
86. Participate in the pre-construction meeting and partnering session			
87. Construction RFI's			
88. Review contractor submittals			
89. Construction Site Visits			
90. Commissioning (Cx) Plan			
91. Design Mods (Revisions to CAD, BIM, CID or Contract w/implications to design)			

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92. LEED Submission to USGBC or other similar certifying organizations			
93. Furnishing Fixture and Equipment (FF&E) Plan			
94. Construction Operations Building information exchange			
95. Organize an After Action Review (AAR) to document lessons learned			
96. Ensure final as-builts are submitted by the contractor			
Project Closeout			
97. Document completion of sustainability requirements			
98. Evaluating and Documenting Performance (if required)			
99. Final Pay to Contract (AE/Const)			
100. Managing Information and Knowledge (AAR)			
101. DD1354 Initial Setup			

Project Manager Signature

Technical Lead Signature

Project Name:

NOTES: