

## PROJECT MANAGER and TECHNICAL LEAD ROLES and RESPONSIBILITIES CHECKLIST GUIDANCE

### PURPOSE:

As stated in ER 1110-3-12 Military Engineering and Design – Quality Management, a clear delineation of Project Manager (PM) and Technical Lead (TL) roles should be established at the beginning of each project to avoid duplicative efforts and to de-conflict critical project deliverables. The Project Manager and Technical Lead Roles and Responsibilities Checklist (PM-TL Checklist) is intended to facilitate establishing and coordinating project roles and responsibilities. This guidance document is to be used in conjunction with the PM-TL Checklist to provide guidance on how to use the checklist. The list of tasks in the PM-TL Checklist is not intended to be all-inclusive and as such includes blank spaces to add tasks as needed. The purpose of this checklist is to ensure the needed activities throughout the project are considered and performed and to help facilitate a common understanding of these task(s). The checklist should be incorporated into the Project Management Plan (PMP) and distributed along with the PMP to the PM, TL, and their respective chain of command.

The guidance document provides a description of the tasks, and the PM-TL Checklist provides a default division of responsibilities. Depending on the project and the level of experience of both the PM and TL, the division of responsibilities may change from the default assignments.

### POLICY:

ER 1110-3-12, “The TL roles do not overlap those of the PM, and a clear delineation should be established at the beginning of each project to avoid duplicative efforts.” And “Conflicts concerning technical quality between the PM and TL must be elevated through the chain of command.”

### APPLICABILITY:

This guidance document is a Supplement to ER 1110-3-12 Military Engineering and Design – Quality Management and ER-5-1-11, USACE Business Process.

This guidance checklist was developed as a resource for Districts to improve consistency. Districts can adapt it to fit their specific needs. The focus is on engineering and construction (E&C) deliverables based on the MilCon design process but can be adapted for other project types. For projects outside of the E&C framework the applicability of this guidance checklist should be discussed between the PM and TL at the start of the project.

### DEFINITIONS:

**PM – Project Manager:** Each project is assigned to one PDT, with a single PM for management and leadership across the acquisition life cycle of the project. Senior Leaders, or their designees, select the PM based on the individual’s abilities to best lead the specific project, without regard to assigned organizational element. The PM is responsible for ensuring that the necessary disciplines and perspectives are represented within the PDT. The technical lead serves as the proponent for the project’s technical quality. (ER 5-1-11)

**TL - Technical Lead:** The TL is a technically qualified PDT member. Typically, the TL has discipline-specific PDT duties, or on the determination of local Engineering, acts only as TL without additional PDT responsibilities. The TL confirms that all design deliverables include the authorized project scope and addresses compliance with all applicable code, policy, and criteria. The TL has specific, individual responsibility to ensure that each deliverable is prepared and reviewed according to the Project Management Plan and USACE standards and guidance. (ER 1110-3-12)

**RM – Resource Manager/Provider (Supervisors or Functional Chiefs):** Lead their staffs to implement the USACE business process to successfully execute the mission. They are responsible for the quality of the processes employed to execute all work. (ER 5-1-11)

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R-A-C-I Chart: A RACI chart is a simple matrix used to assign roles and responsibilities for each task, milestone, or decision on a project. By clearly mapping out which roles are involved in each project task and at which level, you can eliminate confusion and answer the age-old project question: Who’s doing what?

- **R = Responsible:** The person who actually completes the task and performs the work. (At least 1 person should be responsible for each task.)
- **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. (Only 1 person should be accountable for each task, the same person can be both accountable and responsible.)
- **C = Consulted:** Anyone who must be consulted with prior to a decision being made and/or the task being completed. (Many people can be consulted for each task.)
- **I = Informed:** Anyone who must be informed when a decision is made, or work is completed. (Many people can be informed for each task.)

RACI chart definition guide		
	DEFINITION	NUMBER OF TEAM MEMBERS TO ASSIGN
Responsible	Does the work to complete the task	At least 1 per task
Accountable	Delegates work and is the last one to review the task or deliverable before it’s deemed complete	Limit to 1 per task
Consulted	Provides input based on either how it will impact their future project work or their domain of expertise on the deliverable itself	No max or minimum
Informed	Needs to be kept in the loop on project progress, rather than roped into the details of every deliverable	No max or minimum

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### PROJECT PHASES AND TASK DEFINITIONS:

The following tasks do not need to happen in the order shown below. They are intended to be mostly sequential, however many tasks are iterative or can occur concurrently. In addition, in an attempt to connect this document to the Checklist the tasks here are numbered so as to match up to the numbered tasks in the checklist.

### PROJECT INITIATION:

1. *Initiate Project in P2:* Set up and initiate the project in P2. The PM is the responsible for ensuring that the project has been properly setup in CEFMS. This includes, but is not limited to, preparing the Project Initiation Form (PIF), and the Project Charter.
2. *Establish seed funds for project initiation tasks:* TL requests seed funds from PM for project initiation tasks. PM ensures funds are provided for the team to perform required work for project initiation tasks.
3. *Identify and Confirm Required Disciplines for PDT:* The PM is responsible for ensuring that the necessary disciplines and perspectives are represented within the PDT. The PM often consults with the TL to ensure the appropriate disciplines are selected for the project or the PM can delegate this task to the TL. Once disciplines are identified the PM will work with the RMs to assign PDT members.
4. *Develop the Project Management Plan: Develop Preliminary Scope, Schedule, and Budget:* The PM, in direct coordination with the TL, develops and prepares preliminary scope, schedule, and budget (and project cost) as part of project initiation. This includes DD1391 for MILCON. Develop, coordinate, and get approval of the Project Management Plan. The PM is responsible for developing and maintaining, through a minimum of annual reviews, and getting approval of the Project Management Plan.
5. *Develop the project quality management plan (QMP) and quality control plan (QCP):* Prepare the project quality control plan and document DQC, ITR, and BCOES review details as applicable. The Quality Management Plan is the quality component of each Project Management Plan and documents project-specific quality objectives and Quality Control procedures appropriate to the size and complexity of the project. The QCP is a component of the QMP and defines how quality control will be executed. It is a living document that will be updated to reflect changes in the PDT or process.
6. *Initial Installation Planning Meeting:* The initial planning meeting is a collaborative process that reviews and validates facility/infrastructure requirements to ensure a project scope meets the requirement and is within authorization. This process also develops budget level cost estimates and draft programming documents. The PM, in direct coordination with the TL, plan, schedule, and coordinate the Planning Meeting, ensuring all critical team members and stakeholders are present.
7. *Planning Meeting Report:* The Construction Agent Project Manager (CAPM) for USACE is responsible for the development and completion of the Planning Report in accordance with Code 0 directives and guidance instructions. The PM, in direct coordination with the TL, plan, schedule, and coordinate the Planning Meeting Report, ensuring all critical team members are present and provide inputs into the Planning Meeting Report. The Planning team is typically composed of, but not limited to, a combination of the various disciplines listed below. The makeup of the team will depend on the type and scope of the project. A single person can be responsible for multiple disciplines. The remaining team members are responsible for providing technical input during the report development process and assisting in the deliverables preparation:

- 1) Facilitator/Project Manager\*
- 2) Planner/Programmer\*
- 3) Architect

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- 4) Environmental Planner\*
  - 5) Structural Engineer
  - 6) Civil Engineer\*
  - 7) Cost Engineer\*
  - 8) Leadership in Energy and Environmental Design (LEED) Accredited Professional.
  - 9) Electrical Engineer
  - 10) Mechanical Engineer
  - 11) Fire Protection Engineer
- \* = Required team members

### PROJECT PLANNING:

8. *Define Basic Scope:* The basic scope includes the end deliverables and project constraints as defined by the PM and client. This includes reviewing the scope identified in programming documents in coordination with the TL.
9. *Initiate Execution Strategy – Acquisition Strategy Meeting:* Coordinates with Program Manager and Resource managers, TL, and Project Delivery Management Team (PDMT). PDMT will determine if the district has the capacity to execute the project in-house. This is the general execution strategy details of portions of the project that may need to be contracted will be established in the *Define External Capabilities Required* section.
10. *Establish Critical Milestones and Constraints:* Using the Basic Scope, establish critical milestones and deadlines along with constraints such as budget and other resources. This step establishes the box in which the detailed scope can be built. These milestones should be outlined in the Project Charter with the Program Manager. (Used to guide the establishment of the schedule)
11. *Identify and Engage USACE Centers of Standardization (COS) and Centers of Expertise (CX):* Identify and engage the necessary USACE Centers of Standardization and Centers of Expertise for the project (if needed). The TL helps identify all required technical disciplines. The PM is responsible for establishing the initial line of communication between the PDT and COS. The initial discussion should include, but is not limited to, discussion(s) of project details (Scope, Schedule, and Budget), stakeholders (Installation, Customer, Municipality, Non-federal Sponsor, etc.), and how best to employ the COS/CX. After initial contact and deliberations the TL would takeover technical details and conversations between COS/CX and PDT.
12. *Engage Division or District Sustainability SME:* The PM and TL will meet with the Sustainability SME to identify the project requirements for compliance with UFC 1-200-02 High Performance and Sustainable Building Requirements. This may include registration of the project for third party certification via LEED Online, USGBC or another third party certification agency.
13. *Confirm commissioning approach:* PM and TL will confirm the commissioning approach for the project to comply with ER 1110-345-723 Total Building Commissioning Procedures and any third party certification requirements for enhanced commissioning. Confirm roles and responsibilities and if the CxA/CxG will be filled by an in-house team member or will need to be contracted out to an A-E.
14. *Request resources for scoping:* The PM works with resource managers to identify people in the identified disciplines to help develop a detailed scope and request their time. The PM can delegate this task to the TL.
15. *Request Planning and Design Funds (P&D):* The PM coordinates set up of the initial seed funding for project planning, design kickoff meetings and initial budget development.

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16. *Value Engineer (VE) Screening*: For projects over \$2M, the TL and/or PM will notify the District Value Officer (DVO) to initiate the VE Screening process. The TL and PM will input information into the VE screening spreadsheet provided by the DVO. The DVO will decide on the VE Strategy (Value Management Plan Only, Low Opportunity Scan, or VE Study).
17. *Initial Budget Estimating Tool (BET) and schedule development*: PM/TL work with the entire PDT (including non-design team members) and RMs to develop the initial overall BET. The PM is responsible and accountable for project scope, schedule, and budget.
18. *Initial Design Team Budget Estimating Tool (BET) for Technical Resources*: PM/TL work with the PDT and RMs to develop the initial design team BET. The PM is accountable for project scope, schedule, and budget, however the TL leads the coordination of BET development for Design Branch disciplines internally among design members of the PDT and RMs to obtain Branch Chief approval. TL sends to PM once approved.
19. *Data Management Set Up- Project Files*: The project files structure should adhere to, or closely resemble, the file structure provided for MILCON and CIVIL WORKS projects. The PM/TL are responsible for creating, follow on knowledge management, and proper dissemination of file location to the PDT. The TL will create an MS Teams Page and OneNote file for project coordination, following district templates. The OneNote file will document locations(s) of all project files.
20. *Data Management Set Up- Technical files*: Determine the data management strategy and then work with geospatial team to set up a file location and/or ProjectWise file location, following district standards.
21. *Data Collection and Document Review*: Collect, distribute, and review pertinent historical and project authorization documents with the PDT, to include previous as-built drawings, utility plans, cost estimate, risk register, best practices, lessons learned, etc.
22. *Define External Capabilities Required*: Are external capabilities such as surveying, AE-support, cross-district support, drilling, etc. needed? The TL will help identify technical requirements and the PM will resource them.
23. *Identify A-E support requirements*: The TL will develop the statement of work for an A-E task order, in coordination with the PM and PDT. The TL will support the PM and COR with A-E negotiations.
24. *Prepare Design Review Plan*: Determine what levels of review are necessary based on the type and scope of the project. Use EC 1165-2-217 to assist in determining levels of review.
25. *Identify design criteria and project requirements*: Identify pertinent design criteria documents including but not limited to: Unified Facilities Criteria (UFCs), Standard Designs, Technical Manuals (TM), Installation Design Guides, Engineering Technical Letters (ETLs), and Engineering and Construction Bulletins (ECBs).
26. *Kick-off Meeting*: Initial meeting with PM, TL, and key PDT members. The purpose of the initial kick-off meeting is to discuss the current project plan, project background, objectives, schedules, costs, design options, major issues, problem areas, and the type of documents which must be prepared and the level of detail in those documents. PM will prepare a meeting record document.
27. *Update and Finalize Scope, Schedule, and Budget (BET)*: PM is the owner of the project scope, schedule, and budget and is therefore accountable for it. However, the development of this task is often delegated to the TL for the design branch disciplines.

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28. *Prepare and Submit the PMP for Approval:* The project management plan is prepared by the PDT and the effort is typically led by the PM. The TL should work with the PM to prepare the PM-TL checklist and incorporate in the PMP. The PMP and any updates to the PMP should be sent to the TL and their chain of command to ensure that the full team understands and supports the plan.
29. *Setup Labor, PR&Cs, and Travel:* The PM coordinates set up of funding for the PDT meetings based on BET. This is an iterative process which continues through the life of the project. The TL often consults with the PM if PDT members have funding concerns.
30. *Army Standard or Standard Design/Criteria Waiver:* Prepare and submit Army Standard Design/Criteria Waiver (if needed).
31. *Engage with Archeology:* Engages and coordinates project with archeology. The PM initiates the engagement with subject matter experts to provide details as to Scope, Schedule, and Budget and provide labor codes if needed. The TL will ensure that any technical deliverables are provided and any follow-on coordination is conducted.
32. *Engage with Real Estate:* Engages and coordinates project with real estate. The PM initiates the engagement with subject matter experts to provide details as to Scope, Schedule, and Budget and provide labor codes if needed. The TL will ensure that any technical deliverables, such as the Real Estate Rights, are provided and any follow-on coordination is conducted.
33. *Engage with Environmental:* Engages and coordinates project with environment. The PM initiates the engagement with subject matter experts to provide details as to Scope, Schedule, and Budget and provide labor codes if needed. The TL will ensure that any technical deliverables, such as an Environment Assessment, are provided and any follow-on coordination is conducted.
34. *BIM kickoff meeting, prepare Project Execution Plan (PxP):* Engage the district BIM manager to lead a BIM kickoff meeting to document decisions critical to setting up digital design project folders and files and document in the PxP. The intent of a PxP is to document and explain how the digital project is configured and set expectations so all PDT members can understand how to successfully collaborate on the design and documentation of the project. For reference the current full PxP document, Minimum Modeling Matrix (M3) and associated instructions and checklists can be downloaded from the Contract Requirements section of the CAD/BIM Center website: <https://cadbimcenter.erd.c.dren.mil/default.aspx?p=a&t=1&i=14>.
35. *Organize a site visit:* Organize and lead a site visit for the engineering PDT. Identify required field investigations and customer requirements. PM will coordinate approval for photos of the site/facility and arrange access to the site/facility. Prepare a site visit report.
36. *Design Charrette - scheduling:* Plan, schedule, and coordinate the design Charrette ensuring all critical team members and stakeholders are present. The PM will coordinate the location of the charrette with the installation and provide a virtual call-in option for those unable to attend in person. If a site visit will be incorporated with the charrette, the PM will organize access.
37. *Design Charrette – design presentation:* The TL will prepare the design charrette presentation slides in coordination with the PM and PDT. Include sustainability goals and requirements as a topic in the charrette.
38. *Acquire names of reviewers – DQC:* The TL will coordinate with RMs to assign design quality control reviewers.
39. *Acquire names of reviewers – ITR/ATR:* The PM will coordinate assignment of ITR/ATR reviewers in coordination with the TL.

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40. *Acquire names of reviewers – BCOES:* The PM will coordinate assignment of BCOES reviewers in coordination with the TL.

### PROJECT DESIGN:

41. *Plan and host PDT meetings:* The primary responsible for planning and hosting meetings will depend on the project and the PM and TL assigned to the project. It is important to discuss the responsibilities for PDT meetings early in the project in order to ensure clear communication and coordination within the PDT.

42. *Meeting Minutes:* The primary responsible for meeting minutes will depend on the project and the PM and TL assigned to the project. It is important to maintain meeting minutes to enable continuity of a project as a project may be paused or the PM or TL may change throughout the life of a project. Recommend projects have MS Teams pages and OneNote notebooks where meeting minutes can be documented and accessible to everyone.

43. *Communicate with client, regional representatives, and stakeholders:* PMs typically lead external and client communication. However, the PM and TL need to coordinate that an accurate representation of the technical work is communicated.

44. *Preparation of the Parametric Design Report (PDR):* Parametric Design - PDR Parametric Design represents 5-15% project design completion. This report shall follow the report format provided by HQUSACE. The TL is responsible for developing the report, to include ensuring that the appropriate PDT members are present, participate, and provide input into the PDR.

45. *Setup Conduct Value Engineering Study:* All Value-Engineering studies will be conducted by 35% design. The PM will be responsible for coordinating and developing the Value Engineering Study in coordination with the TL.

46. *Preparation of Eng Form 3086 (Current Working Estimate):* The ENG Form 3086, Current Working Estimates for Budget Purposes, will be used for reporting for budgetary CWE at the 35%, 65%, and 95% design milestones. CWE for budget reporting will be prepared using the ENG Form 3086 Module, PC-Cost, or other approved software. The CWE will consist of Primary Facility, Supporting Facility, Information Systems and Anti-terrorism/Force Protection, when required. Each cost item should be developed based on the latest design information. Budgetary estimates will be approved by the Chief of Cost Engineering of the design district before the reporting. The PM is accountable for the budget (labor codes and P&D request) of the development of the CWE. The TL is responsible for the development, in coordination with the PDT (cost engineering), and on time delivery of the CWE at the aforementioned milestones.

47. *Maintain P2 information:* Primavera is an enterprise project portfolio management software. It includes project management, scheduling, risk analysis, opportunity management, resource management, collaboration and control capabilities, and integrates with other enterprise software programs. The PM develops and maintains the schedule, in coordination with the P2 scheduler. The TL provides inputs into the milestone schedule derived directly from the management of the technical team deliverable dates.

48. *Change Management - Document changes to (S,S,B):* A change management plan defines activities and roles to manage and control change during the execute and control stage of the project. Change is measured against the project baseline, which is a detailed description of the project's scope, budget, schedule, and plans to manage quality, risk, issues, and change. The PM is responsible for managing scope (and scope changes/revisions), to include client coordination, upward reporting and approval, in accordance with the Change Management Plan as described and approved in the Project Management Plan. The TL would be

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- informed and, depending on the type of change (design versus administration), in some case be consulted on any proposed change.
49. *Document changes to PMP*: Routinely updates and obtains annual approval of the PMP. If necessary when significant changes occur update the PMP immediately.
  50. *Track project status and execution (financial)*: PM is responsible and accountable for keeping abreast of project activities and ensuring the project is staying on schedule and within scope and budget. This activity includes, but is not limited to, maintaining routine meetings with the P2 scheduler, budget analysis, and upper management. The upward reporting includes providing an updated monthly Quad Chart and attending Branch Specific Line-Item Reviews and, when requested, the Project Review Board.
  51. *Track project status and execution (deliverables)*: The primary responsible for tracking project status and execution will depend on the project and the PM and TL assigned to the project. Frequent communication between a PM and TL on project status and execution is key to the success of a PDT.
  52. *Track project budget and report it to the team*: Every team member is responsible for managing their own budget in coordination with the PM and TL. This task is to track the overall budget and make sure everyone has the most up to date and correct information.
  53. *Report on project status to Design Branch (DB)*: TL will fill out the DB project status sheets and report on project status at monthly DB meetings.
  54. *Report on project status to PRB*: Create slides and read ahead materials for the project review board (PRB) in addition to providing in person status updates as needed.
  55. *Register project for sustainability third party certification by 35% design*: Projects requiring Third Party Certification (TPC) according to UFC 1-200-02 and Army SDD Policy require LEED registration early in the design following determination of LEED rating system and registration approach. Projects should be registered prior to Design Build RFP completion or prior to completion of Code 2 (35%). Registration number, rating system, and sustainability milestone should be input in the P2 system.
  56. *Ensure VE Study is incorporated*: Coordinate with the PDT to ensure all accepted value engineering alternatives are incorporated into the design.
  57. *Verify permit requirements*: Verify that an investigation is completed regarding permitting requirements. If necessary, contact Office of Counsel to validate permit requirements.
  58. *Coordinate product deliverables (for different design phases)*: The TL will coordinate with the PDT to ensure that the multiple deliverables at each design phase are done on time and on budget and will coordinate with the PM. Reference ER 1110-345-700 for submittal requirements.
  59. *Coordinate Interference Management Meetings*: Internal Reviews throughout the design process to resolve clashes prior to Design Quality Control Reviews at each design submittal. The goal of interference management is to enhance design and construction coordination to eliminate conflicts and coordination issues prior to construction of projects.
  60. *Coordinate Design Reviews*: Plan, schedule, and coordinate all the necessary design reviews throughout the life of the project. This includes initiating review set up on DR.Chcks, ensuring the review team is appropriate for the project, and providing the necessary documents for review.



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61. *Monitor DR.Checks for resolution:* Ensure comments are addressed and backchecked.
62. *Coordinate the CSRA meetings with the Cost Engineer:* Cost schedule risk analysis (CSRA) is the process of determining the probability of cost and schedule overruns and assigning a studied growth potential presented as a contingency percentage or value. This contingency must be added to a cost estimate to reduce the uncertainties to an acceptable level. The analysis is a formal process that includes involvement of the project delivery team (PDT) utilizing nationally recognized software based on the Monte Carlo principles.
63. *Coordinate periodic sustainability meetings to track compliance:* The TL will coordinate sustainability meetings with the Sustainability SME and PDT to track compliance with sustainability requirements.
64. *Develop Current Working Estimate (CWE):* PM will engage cost engineering to provide project costs/current working estimate throughout the project as necessary/required, in coordination with TL. This task directly impacts the task of "Preparation of ENG Form 3086" above.
65. *Prepare the Engineering Considerations and Instructions for Field Personnel (ECIFP):* Lead preparation of the Engineering Considerations and Instructions for Field Personnel (ECIFP) per ER 1110-3-12. Coordinate ECIFP input from non-engineering disciplines and functions, as appropriate.
66. *Ensure front end specifications are included in 95% package:* Ensure front end specifications are prepared and included in the 95% package prior to the start of the BCOES review. The submittal is NOT complete without the front end specs.
67. *Coordinate a submittal register coordination meeting:* Schedule and document a submittal register coordination meeting.
68. *Confirm district quality control review is properly performed:* The TL will ensure the DQC checklist is used to ensure that the District has completed the final advertising documents (100 percent ready to advertise design plans and specifications) for this project. It signifies that the drawings and specifications meet the requirements as outlined in USACE and District procedures and guidance.
69. *DQC Certification:* The TL will ensure DQC Certification forms are signed by all disciplines to confirm the District Quality Control reviews were completed.
70. *Confirm BCOES and ITR reviews are completed:* Verify that PDT members are effectively engaged with ITR team counterparts for review of the Final Design documents. Verify the ITR team is provided with DQC documentation. Review the ITR report and ensure changes are incorporated in the design. Verify the ITR Certification form is completed for each contract package. Verify the final level BCOES Review was completed, and results are considered in the design.
71. *Oversee compilation of the final contract documents:* Oversee the compilation of the Certified Final Documents. Ensure that review comments are incorporated in the design.
72. *BCOES routing:* The PM with the TL will coordinate and ensure the *Bidability, Constructability, Operability, Environmental, and Sustainability* (BCOES) review is completed and certification is routed for signatures.
73. *Coordinate completion of AT/OPSEC Coversheet:* Coordinate with the District Security Office to review and incorporate specification clauses related to AT, OPSEC, Information Assurance and other security related measures in the specification package. Complete the AT/OPSEC Coversheet (Signed ENG Form 6055) or waiver.

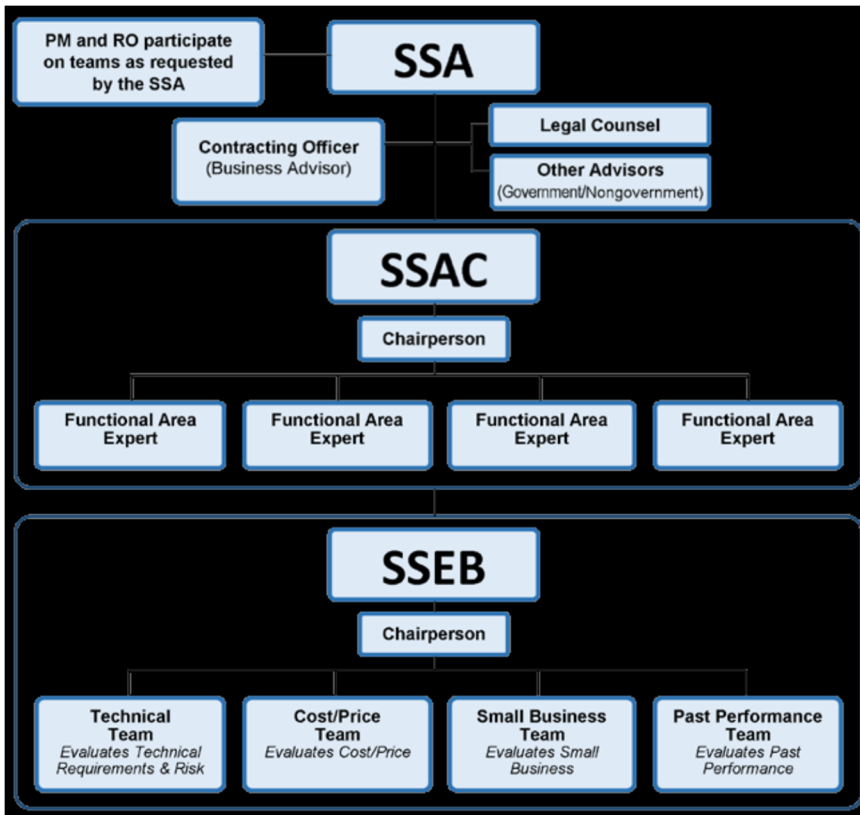
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74. *Develop and Route Form 1:* The Form 1 is representative of the fact that a project (Ready To Advertise package) has been developed in accordance with USACE and District Regulations, Procedures, and Guidance. The Form 1 is a template that is filled out and routed through Project Management, Design Branch, and the Chief of Engineering Division.
75. *Request Authority to Advertise:* PM ensures the Request for Authority to Advertise includes internal approval through Project Management Branch (Civil or MILCON) of the Scope Certification Approval. In order to Request Authority to Advertise the project should have undergone the BCOES routing, Form 1 Routing and Approval, and legal review.
76. *Coordination completion of Draft DD1354:* Coordinate completion of Draft DD1354 Real Property Transfer Form.

### PROJECT ACQUISITION:

77. *Advertise:* The PM will lead coordination with Contracting to release the request for proposal. The use of draft RFPs and a thorough consolidated review by a multi-disciplined team is highly recommended.
78. *Answer KTR RFIs during Bid/Proposal Process:* The PM will lead coordination during the period between the RFP and the final Award the potential pool of offerors/bidders will have specific questions related to the project and will need to be addressed in the allotted time frame. The TL will coordinate with the PDT on technical responses to bidder inquiries and preparation of technical amendments to the solicitation.
79. *Verify completion of the IGE:* Support cost engineering to ensure the Independent Government Estimate (IGE) is complete.
80. *Setup Source Selection Evaluation Board (SSEB) (if used):* Source selection is accomplished by a team that is tailored to the specific acquisition. Teams for larger (greater than \$100m), more complex source selections generally consist of the SSA, PCO (if different from the SSA), Source Selection Advisory Council (SSAC), Source Selection Evaluation Board (SSEB), Advisors, Cost or Pricing Experts, Legal Counsel, Small Business Professionals/Specialists, and 6 other subject-matter experts. SST members may include personnel from other Departmental sources such as headquarters or joint service members. Key members of the SST—such as the SSA, SSAC Chairperson, SSEB Chairperson, functional leads, and the PCO— should have source selection experience in high dollar, complex acquisitions. All members of the team shall be designated early in the source selection process, and agencies shall provide the needed training to execute that specific source selection. The SSEB is comprised of a Chairperson and Evaluators (also known as SSEB members). As shown in the Figure below, SSEB members are frequently organized into functional teams corresponding to specific evaluation criteria (e.g., Technical Team, Cost/Price Team, Past Performance Team, Small Business Team). In those instances, a Functional Team Lead may be utilized to consolidate the evaluation findings of the team and serve as the primary team representative to the SSEB Chair.

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- 81. *Review/Evaluate Bid/proposal:* The SSEB shall conduct an in-depth review of each proposal against the factors and sub-factors established in the solicitation, and assign evaluation ratings (see FAR 15.305).
- 82. *Request Authority to Award:* This is the formal request to HQUSACE to award the construction project. This generally requires that funding be provided and is certified in the District.
- 83. *Assemble the as-awarded contract documents:* Lead the PDT to assemble the As-Awarded Certified Final Documents of the Plans and Specifications.
- 84. *Coordinate Third Party Certification design review:* After contract award, when it is clear what options have been awarded, the team will complete the TPC documentation and submit the design review.

**PROJECT CONSTRUCTION:**

- 85. *Participate in meeting with construction to review the ECIFP:* Schedule ECIFP Hand-off meeting with PDT, Construction Support POC and Field POC.
- 86. *Participate in the pre-construction meeting and partnering session:* Participate in the pre-construction conference and recurring construction meetings, including partnering sessions.
- 87. *Construction RFIs:* Coordinate the response to RFIs (Requests for Information) from the Construction Contractor to in-house design or AE design team within required contract time periods.
- 88. *Review contractor submittals:* Lead the appropriate members of the PDT in the review of contractor submittals within required time periods.

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89. *Construction Site Visits*: Prepare and implement an engineering site visit plan for the construction schedule.
90. *Commissioning (Cx) Plan*: Commissioning is a process in which building systems and their interactions are tested and verified to work in accordance with the Owner's Project Requirements (OPR) and Construction Documents/Contract Documents (CD). It involves engagement of a Commissioning Authority and Commissioning Team during pre-design, design, construction, occupancy and warranty phases. The purpose of the commissioning plan is to provide direction for the commissioning process during construction, providing resolution for issues such as scheduling, roles and responsibilities, lines of communication and reporting, approvals, and coordination.
91. *Design Mods (Revisions to CAD, BIM, CID or Contract w/ implications to design)*: During the Construction of a project there will likely be some form of modification to the design. These design modifications happen for numerous reason(s) to include User Requested Changes, Design Deficiencies, and unforeseen site conditions. The PM ensures thorough review and coordination of potential changes in coordination with the TL, as warranted, to conduct coordination and changes to the design as needed.
92. *LEED Submission to US Green Building Council (or other similar certifying organizations)*: Participate in sustainability meetings with the contractor's LEED AP to ensure compliance with the third party checklist and sustainability requirements in the contract. The contractor will prepare, review, and upload the completed materials for construction credits in LEED Online (or other third party certification system) for the construction review to achieve certification (LEED Silver for Army projects).
93. *Furnishing Fixture and Equipment (FE&E Plan)*: The design/plan of the FF&E includes the layout, selection, specification and documentation of furniture, such as workstations, seating, tables, storage, filing, accessories, and artwork. The documentation facilitates furniture procurement and installation. The FF&E design is based on the furniture floor plan developed in the Structural Interior Design (SID) portion of the interior design that is part of the larger Comprehensive Interior Design (CID) Plan.
94. *Construction Operation Building information exchange*: International standard data format for the exchange of building system information from design and construction to the owner ("handover data"). The deliverable is generally provided in an excel worksheet.
95. *Organize an After Action Review (AAR) to document lessons learned*: PM will facilitate an After Action Review per EM 5-1-11 Project Delivery Business Process. The AAR/Lessons Learned is a quality management process that documents overall performance or level of success achieved on a project or activity throughout its life cycle.
96. *Ensure final as-builts are submitted by the contractor*: Periodically check that revisions to the contract drawings are being maintained by field personnel. Ensure redline markups are current and accurate. Ensure that accurate final as-built drawings are prepared and submitted by the contractor.

### PROJECT CLOSEOUT:

97. *Document completion of sustainability requirements*: The Sustainability Code (Column 14 in DD Form 1354) reports whether or not an asset meets the sustainability guidelines set forth in UFC 1-200-02 (4-2.4 Building Compliance Reporting). DD1354 should have a code "1" (Asset meets the guidelines) unless there is something preventing compliance with the UFC. Do not indicate a code "3" (Asset not evaluated) if the PDT is waiting for Third Party Certification since there is no mechanism for the Real Property record to be updated after the fact. Installation real property staff are responsible for entering the correct sustainability code into the Army Real Property database. If the code is not entered at the installation level, it will not be recorded as compliant with sustainability requirements in the Army Real Property database.

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*98. Evaluating and Documenting Performances (if required):* For example, CPARS.

*99. Final Pay to Contract (AE/Const):* This is the final payment to the contractor (AE, Construction, etc) that entails receiving the “Release of Claims” from the contractor.

*100. Managing Information and Knowledge:* PM is responsible for ensuring current After Action Review (AAR) policies are applied, and for ensuring Construction Contract Management team ensures final documents such as As-Built drawings are obtained and saved, ensure final documents are saved and filed as needed.

*101. DD1354 Initial Setup:* Transfer of real property to the Real Property Accountability Officer (RPAO) or assigned Real Estate Expert should be conducted at project completion or Beneficial Occupancy Date (BOD). The interim/draft DD1354 and DD1354 Coordination Memo, along with meeting, should be completed prior to finalizing the DD1354. The interim DD1354 should be completed no later than the first Red Zone (or first Yellow Zone for M/IIS Projects) construction partnering meetings. PM ensures compliance with the HQ USACE Real Property Audit Readiness Policy.