

Responsibility Matrix for Tustin USD Measure G Program

Task	Responsible Party (see Key at end of Matrix)					
	District	Program Manager	Construction Manager (Agency)	A/E	Contractor	Inspector
<i>Program Management:</i>						
Implementation Plan	Directs	Primary		Assists		
Program Management Plan	Directs	Primary				
Master Schedule	Directs	Primary		Assists		
Master Budget	Directs	Primary		Assists		
Cost Control	Directs	Primary	Assists	Assists		
Prolog)	Directs	Primary	Reports	Reports	Reports	Reports
Status Reporting and Communication Management	Directs	Primary	Reports	Reports	Reports	Reports
Procurement Planning	Primary	Assists	Assists	Assists		
Other Program Management Tasks	Directs	Primary				
<i>Pre-Design Phase:</i>						
Permits/Approvals		Assists		Primary		
Standardized Design Tools	Primary	Assists		Assists		
surveys	Primary			Reviews		
Provide detailed written program	Directs			Primary		
Provide District standard specification	Directs	Assists		Primary		
Site investigations to gather data on existing conditions	Assists	Assists		Primary		
Discussions with facilities staff regarding existing conditions	Assists	Assists		Primary		
Provide hazmat data	Primary			Reviews		
Provide project budgets	Directs	Primary		Reviews		
Minutes of all project meetings	Receives	Receives		Primary		
Preparation of detailed design work plan/schedule	Directs	Approves		Primary		
<i>Design Phase:</i>						
Consultation During Project Development	Directs	Reviews	Assists	Primary		
Design Reviews	Primary	Assists	Assists			
Scheduling	Reviews	Primary	Assists	Assists		
Estimating (preliminary)	Reviews	Reviews		Primary		
Construction Planning (delivery methods)	Reviews	Reviews	Primary (1)	Primary (1)		
Preparation of all phases of Construction Documents (SD's, DD's, 50%, etc.)				Primary		
All required reviews by DSA	Reviews	Reviews		Primary		
Quality Control and coordination of documents				Primary		
Third-party review for QA, coordination of documents, Constructibility, Value Engineering, etc.	Primary	Reviews	Assists (1)	Assists (1)		Reviews
Estimating (50% CD's)			Assists	Primary		
Estimating (90% CD's)			Assists	Primary		
Incorporation of DSA backcheck corrections and Constructibility & VE comments				Primary		
Backcheck verification of DSA, Constructibility and VE comments	Primary	Reviews	Assists			Reviews

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Minutes of All Meetings	Receives	Receives	Reviews	Primary		

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<i>Bid & Award Phase</i>						
Cost Control (Budget vs. Actual)	Receives	Primary (1)	Primary (1)	Assists		
Cost Control (Historical Cost Data)	Receives	Primary	Assists	Assists		
Reproduction & distribution of bid documents	Receives	Receives	Primary (1)	Primary (1)		Reviews
Advertising & legal notices	Primary (1)		Primary (1)	Assists		
Contractor marketing	Primary (1)		Primary (1)			
Pre-bid meeting	Primary (1)	Assists	Primary (1)	Assists		
Addenda			Assists	Primary		
Bid Opening	Primary (1)	Assists	Primary (1)	Assists		
Recommendation for award	Primary	Assists	Assists			
Draft and issue contracts	Primary	Reviews	Assists	Receives		
Review insurance & bonds	Primary (1)	Assists	Primary (1)			
Issue notice to proceed	Primary (1)		Primary (1)	Receives		
Pre-Construction meeting	Receives		Primary (1)	Primary (1)	Receives	Assists
<i>Construction Phase</i>						
Change Orders below \$10,000	Approves	Receives	Primary (1)	Primary (1)		Approves
Change Orders above \$10,000	Approves	Approves	Primary (1)	Primary (1)		Approves
Reports and Project Site Documents	Receives	Primary	Reports	Reports		
Furniture, Fixtures and Equipment	Primary	Reviews		Assists		
Permits/Approvals	Receives		Primary (1)	Assists	Primary (1)	Receives
Construction Schedule Preparation		Reviews	Primary (1)	Reviews	Primary (1)	
Submittal review	Receives		Assists	Primary	Reports	Receives
Requests for Information Response	Receives		Assists	Primary	Reports	Reviews
Progress payments	Approves	Receives	Approves	Approves	Primary	Approves
Site staff interface	Assists	Assists	Primary (1)	Assists	Primary (1)	
Hazardous materials abatement	Primary		Receives	Reviews	Receives	Receives
Moving	Primary		Assists (1)		Assists (1)	
Cleanup			Primary (1)		Primary (1)	
DSA required reports & Change Orders			Assists	Primary	Assists	Primary
Punchlist preparation	Assists		Assists	Primary	Assists	Primary
Punchlist clearance	Assists		Assists	Primary		Assists
DSA Closeout documents	Receives		Assists	Assists	Primary	Approves
Minutes of All Meetings	Receives	Receives	Reviews	Primary	Reviews	Reviews
Contract closeout documents	Receives	Approves (1)	Approves (1)	Approves	Primary	
As-builts	Receives	Approves (1)	Approves (1)	Documents	Primary	Reviews
Warranty follow-up	Assists		Assists	Assists	Primary	

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Warranty Site Visit (11-month)	Assists		Assists	Assists	Primary	
Labor Compliance Program	Primary					

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<i>Tasks Common to all Phases</i>						
Scheduling	Directs	Primary	Assists	Assists		
Deferred Maintenance	Primary	Assists	Assists	Assists		
Schedule Update and General Reports		Primary	Reports	Reports	Reports	
Communications Plan	Directs	Primary	Assists	Assists		
State-Funding Applications During Program Development	Primary	Assists	Assists	Assists		
DVBE	Receives	Primary	Reports	Reports	Reports	
Minutes of Program Manager lead meetings	Receives	Primary	Receives (2)	Receives (2)		
Citizen's Oversight Committee	Directs	Primary	Receives (2)	Receives (2)		
Site Committees	Directs	Assists	Assists	Primary		
Safety Program		Reports	Reviews		Primary	

KEY:

Primary	Responsible for initiating, leading, managing, coordinating and/or providing
Assists	Responsible for Assisting the Primary responsible party
Reviews	Responsible for timely review and appropriate action and/or comment
Approves	Responsible for timely review and Approval
Receives	Responsible for Receipt of information only, no action required
Directs	Responsible for providing necessary information or Direction on what is required
Reports	Responsible for timely Reporting of specific project information
(1)	Responsibility is dependent upon the delivery method (i.e. CM Multi-Prime vs.
(2)	When appropriate or pertinent