PBOT Project Delivery Responsibilities for Capital Improvement Projects

AA	=	Approval Authority
LP	=	Lead Person
RR	=	Review and Recommend
PI	=	Provides Input
IO	=	Information Only

*Capital Project Controls Group is the Approval Authority for Major Changes to Project Schedule, Budget and/or Scope.

Task	Project Manager	Construction Manager	PBOT Lead Supervising Engineer	Procurement Specialist	Construction Technician	Construction Inspector	CDS Project Designer OR CDS Reviewer on Consultant Designs	Local Certification Manager (Federal-Aid Projects Only)	Program Manager	*Capital Project Controls Group	Notes/Comments
OVERALL PROJECT DELIVERY											
Overall Project Schedule	LP		RR						AA	*	PMs provide this through the entire project duration.
Overall Project Budget	LP		RR						AA	*	PMs to track budgets by phase; include contingency for each phase.
Overall Project Scope (Includes Scope Change Management)	LP		RR						AA	*	Includes providing scope description in CIP budget.
Project Billings	LP	PI	PI								
Permitting	LP		RR				PI	PI			
Right-of-Way	LP		RR				PI	PI			Right of Way Manager has Approval.
Public Involvement	LP	PI	PI				PI	PI			
Intra-Bureau Coordination (including MOUs)	LP**		RR**				PI	PI			**ESD Mgr has Approval Authority/Signs MOUs after Review/Recommend by EOR and CDS Supervisor. EOR leads technical teams and coordination of technical issues.
Federal Aid - Consultant Selection Checklist (federal only)	LP			PI				AA			
Develop Consultant Contract and Scope, etc.	LP		RR				PI				On-Call Contracts Lead - Ryan Webb.
DESIGN THROUGH CONSTRUCTION											
Design Phase											
Project Initiation Report	LP		RR				PI		AA		
Design Schedule Monitoring	LP		RR								
Design Budget Monitoring	LP		RR								
Scope Change Management	LP		RR								
Tree Permit	LP		RR				PI				
Utility Notifications (1-4)	PI		PI				LP				Copy CM on 4th Utility Notification.
Utility Notifications for Consultant Designs	PI		PI				LP				Copy CM on 4th Utility Notification.
Provide Easement Status Summary	PI		RR				PI				Right of Way is Lead Person
Design Delivery (PS&E)	PI	PI	LP		PI						EOR provides "Direct Supervision And Control" per ORS. PBOT Supervising Engineer provides recommendation to City Engineer (SteveT) to Advertise and Issue Street Opening Permit.
Federal Aid - PS&E Checklist	LP		AA				PI	AA			
Ad, Bid and Award Phase											
Authority to Bid/Contract****	LP		RR						AA		***If Contract is over $500k, then Procurement provides Council documents to approve contract.
Advertisement for Bid				LP							
Respond to Questions	PI	PI	RR	LP City			PI				Procurement to email questions to CDS Designer/Reviewer with cc to Supervising Engineer.
Review of Bids/Recommend Award for City Engineer	PI*		AA				LP				*If bid is 110% or greater than the engineer's estimate, then the Project Manager has "Review and Recommend" to make a decision with the rest of the team on how to move forward.
Issue Notices of Intent to Award, etc.				LP							
Contract Award	PI			LP							
Federal Aid - Ad, Bid & Award Checklist	LP		PI	PI			PI	AA			
Construction Phase											
Contractor Communications	PI	LP			PI	PI					CM IS THE POINT OF CONTACT WITH THE CONTRACTOR.
Pre-Construction Meeting	PI	LP	PI	PI	PI	PI	PI	PI			
Post Construction Phase											*Remember - need to budget for closeout activities.
Establish and Monitor Closeout Schedule	PI	LP									CADD Personnel/Contractor Requirement. Review.
Record Drawings (As Constructed)		AA				LP					To be filed in eBuilder and Construction folder (CDS Drive). Coordinate with CDS CAD
Two Year Warranty Process		RR					PI				CONSTRUCTION INSPECTION SUPERVISOR
Project Archiving		RR			LP						Hard and electronic filing.
Post Construction Design/Construction Team Mtg	PI	LP	RR	PI	PI	PI	PI				AKA the "Project Mortem"
PM Closeout Report	LP	PI	PI					PI			
Close Project Number	LP	PI			PI						PM closes project number.