

Building Practice Guidelines: Typical Building Projects Linear Responsibility Charts (BP-LRC) (Tasks listed for the Project Definition Phase)

As a contribution to Building Practice Guidelines, these Linear Responsibility Chart templates list the typical tasks involved in a building project according to its phase or stage. Each entry recommends who should take the lead and who else should be providing significant support for each task. The tasks should be modified or augmented to suit the particular project and the needs of its participants.

In a well developed team, all will participate to some degree. Nevertheless, on a project it is essential for the project manager to identify who will be accountable for initiating, conducting and concluding each and every task.

The charts illustrate how:

1. Every task can be identified and assigned to a single point responsibility
2. The project can and should be divided into phases and stages, each separated by a financial 'control gate' or decision point for control purposes
3. This process builds on the standard project management generic life cycle, and
4. Project management can and should be distinguished from the technical management of the project.

It is worth noting that experience shows that any omissions or errors of judgment in one phase can cost an order of magnitude higher (i.e. approximately ten times) to conduct or rectify in each succeeding phase. This is due to the likely need to suspend, back track and rework other activities that would normally follow.

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Linear Responsibility Charts (BP-LRC)

Legend

- OD Owner or Developer of project
- PD Project Director, Owner's representative
- LAC Lead Architect or Consultant
- denotes primary responsibility
- JA Jurisdictional Authorities
- PCM Project Construction Manager
- ⊙ denotes significant supporting responsibility

2.0 Project Definition Phase

2.1.0 Stage 1 - Concept Development

- Throughout every project phase, both Project and Technical Management must proceed in tandem and be closely integrated.
- In this stage, the 'PCM' is a knowledgeable construction industry representative such as a senior construction estimator or experienced construction manager.

Ref #	Task Description	Responsibility>	OD	PD	LAC	PCM	JA
2.1.1.0	Project Management						
2.1.1.1	Outline responsibilities of the project team		⊙	●			
2.1.1.2	Determine organization & staffing to administer project		⊙	●			
2.1.1.3	Establish basic communication procedures		⊙	●			
2.1.1.4	Interview & select architects		⊙	●	⊙		
2.1.1.5	Interview & select engineers, estimator, other consultants			●	⊙		
2.1.1.6	Select senior construction estimator			●	⊙		
2.1.1.7	Retain Land Surveyor		⊙	●			
2.1.1.8	Review & agree team responsibilities			●	⊙		
2.1.1.9	Establish fees		⊙	●	⊙		
2.1.1.10	Prepare contractual agreements			●	⊙		
2.1.1.11	Execute contractual agreements		●	●	⊙		
2v.1.12	Establish reporting & accounting procedures		⊙	●	⊙		
2.1.1.13	Analyze architectural program versus budget			●	⊙	●	
2.1.1.14	Reconcile program vs. budget & update Conceptual Budget			●	⊙	●	
2.1.1.15	Review & update financial pro formas		⊙	●	⊙		
2.1.1.16	Establish cash flow projections			●	⊙	●	
2.1.1.17	Conduct financing studies		●	●	⊙		
2.1.1.18	Establish Definition Level Budget for cost control purposes			●	⊙	●	
2.1.1.19	Assemble Project Charter (Project Brief) documentation		●	●	⊙	⊙	
2.1.1.20	Review and approve or...		⊙	●	⊙		
2.1.1.21	Revise as needed		⊙	●	⊙		
2.1.1.22	Release next stage funding based on report, <i>or abort</i>		●	●	⊙		
2.1.2.0	Technical Mgt: Concept Development						
2.1.2.1	Elaborate & define Functional Program				●	●	
2.1.2.2	Analyze and comment on updated Functional Program		⊙	⊙	●	●	
2.1.2.3	Evaluate building design				●	●	
2.1.2.4	Establish energy conservation parameters				●	●	
2.1.2.5	Evaluate & recommend alternative systems and materials			⊙	●	●	⊙
2.1.2.6	Establish vertical transportation parameters			⊙	●	●	⊙
2.1.2.7	Liaise with Jurisdictional Authorities for zoning & approvals			⊙	●	●	
2.1.2.8	Prepare guidelines for Development Agreement		⊙	⊙	●	●	
2.1.2.9	Conduct technical design meetings			⊙	●	●	⊙
2.1.2.10	Conduct site evaluation				●	●	⊙
2.1.2.11	Coordinate utilities evaluation				●	●	⊙
2.1.2.12	Assemble technical documentation for Project Charter			⊙	●	●	

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2.2.0 Stage 2 - Schematic Design

- In this stage, the 'PCM' is a knowledgeable construction industry representative such as a senior construction estimator or experienced construction manager.
- The end of this stage is the culmination of the 'planning phases' and requires the owner/sponsor to take a **Major Decision** on whether to proceed to **Project Implementation**.

Ref #	Description	OD	PD	LAC	PCM	JA
2.2.1.0	Project Management					
2.2.1.1	Prepare detailed design schedule		⊙	●		
2.2.1.2	Retain special consultants (as required)		●	⊙		
2.2.1.3	Determine security loss prevention program	●	⊙			
2.2.1.4	Arrange survey monitoring of adjacent buildings		●	⊙		
2.2.1.5	Liaise with owner's legal counsel	⊙	●			
2.2.1.6	Develop bid package formats		●	⊙		
2.2.1.7	Identify long-lead purchase items			⊙	●	
2.2.1.8	Develop phased construction schedule (if trade contracting)		⊙	⊙	●	
2.2.1.9	Initiate preliminary insurance review	⊙	●	⊙	⊙	
2.2.1.10	Review & update schedule	⊙	●	⊙	⊙	
2.2.1.11	Raise Conceptual Budget to Definition Level Budget		⊙	⊙	●	
2.2.1.12	Review and update financial pro formas	⊙	●			
2.2.1.13	Assemble Project Charter (Project Brief) documentation		●	⊙	⊙	
2.2.1.14	Review and approve, or	●	●			
2.2.1.15	Revise as needed	⊙	●	⊙	⊙	
2.2.1.16	Major Decision: Project financing & go ahead, or abort	●	●			
2.2.1.17	Execute development agreement	●	⊙			⊙
2.2.2.0	Technical Mgt: Schematic Design					
2.2.2.1	Arrange & chair design coordination meetings		⊙	●	⊙	
2.2.2.2	Refine Functional Program			●		
2.2.2.3	Confirm basic materials & systems			●	⊙	
2.2.2.4	Establish building form	⊙		●		
2.2.2.5	Prepare schematic drawings			●		
2.2.2.6	Prepare outline specifications		⊙	●	⊙	
2.2.2.7	Identify, review & recommend special areas of study			●		
2.2.2.8	Prepare alternate schemes	⊙		●		
2.2.2.9	Analyze alternate schemes		⊙	●	●	
2.2.2.10	Conduct energy economics study		●	⊙	⊙	
2.2.2.11	Conduct value engineering analysis		●	⊙	⊙	
2.2.2.12	Contact all Jurisdictional Authorities for codes, interpretation		●	⊙		⊙
2.2.2.13	Commence & coordinate engineering designs			●		
2.2.2.14	Apply for Development Review & Plan Approval			●		⊙
2.2.2.15	Arrange for models, renderings, etc.		⊙	●		
2.2.2.16	Conduct Development Review & Plan Approval negotiations		⊙	●		⊙
2.2.2.17	Conduct public consultations (as appropriate)		●	⊙		
2.2.2.18	Prepare & present schematic design documentation		●	⊙		