



Construction Manager Certification Institute

QUALIFICATION MATRIX ADDENDUM:

The following are just some examples of typical Responsible-in-Charge (RIC) functions for each of the fifteen specific areas identified in the experience matrix, Section II above. We realize that there are other possible RIC functions which could result from regional differences and the specific project involved. As you fill out the form, you should use the examples below as a guide and complement it with your good judgment as you answer “Yes” or “No” to the question, “Did the decisions that the applicant was empowered to make directly impact the successful completion of the project and was the applicant directly responsible in charge of construction management services?”

PRE-DESIGN PHASE

Project Management:

Assist owner in deciding project delivery method. Review/Approve or recommend approval of Feasibility Study for accuracy and applicability; Review the Environmental Impact Report; Select/Assist owner in selecting the Design Consultant; Establish the initial Project Organization; Prepare/Approve the Responsibility Matrix; Prepare/Approve the Construction Management Plan; Prepare/Approve the Project Procedures Manual; Chair the Pre-design Project Conference; Establish the Management Information Systems; Participate in the Site Reconnaissance Committee meetings and decisions; Identify and Coordinate with the stakeholders of the project; Have initial meetings with the pertinent Regulatory Agencies/Offices. Prepare a Risk Register and Risk Management Plan.

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DESIGN PHASE

Project Management:

Chair Design Review meetings; Approve or recommend approval of design contracts, subcontracts and amendments; Coordinate preparation and approval of General and Special Conditions in the contract documents; Approve or recommend the approval of the Public Relations Plan; Approve project funding allocations; Organize and Chair meetings; Establish cost controls; Approve design schedules; Brief stakeholders on the design status and on-going actions; Develop Risk Management Register; Develop the Quality Control/Quality Assurance program; Develop Project Reporting Requirements; Lead the Constructability Review; Participate in or evaluate Value Engineering studies; Prepare or review the Engineer's Construction Cost Estimates and Compare with Budget. Perform contractor/vendor/supplier/labor market study. Implement and Update the Risk Management Plan.

Cost Management:

Chair regularly scheduled meetings to review the Design Progress; Approve or recommend approval of designer invoices; Review project estimates; Reconcile Estimates against Project Budget; Evaluate potential Value Engineering savings; Review and approve cash flow diagrams; Manage project funding and costs; Approve the cost loaded design schedule; Identify Cost Saving options; Review and Comment on completeness, accuracy, and the effect on schedule and cost of the Plans & Specs, at the various submittal stages.

Time Management:

Chair the Design Coordination meetings; Develop Project Milestones; Manage/Approve the master schedule; Engage Stakeholders to provide input on the master schedule; Manage/Approve the design schedule; Manage/Approve the milestone schedule; Establish/Approve the preliminary construction schedule; Ensure that Long Lead Items are identified and entered into the schedule; Ensure that Environmental considerations are identified and thoroughly addressed during design; Identify and contact potential equipment and material suppliers to validate schedule assumptions.

5. Quality Management:

Review Design Quality Control procedures; Conduct Constructability Reviews and submit to designer for incorporation; Manage the Document Control function, Review design submittals, Design criteria changes, Quality Control and Quality Assurance efforts; Review and Approve project estimates; Reconcile Estimates, and evaluate the quality implications of Value

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Engineering recommendations; Verify construction duration; Approve Construction/Material testing requirements; Approve Quality Management plan; Manage the implementation of Quality Control/Quality Assurance requirements during construction; Manage the project review meetings, the public relations program and reports.

PROCUREMENT PHASE

Cost Management:

Identify Long Lead Items; Recommend materials for pre-purchase; Check with the local labor market to evaluate the trade worker capacity; Confirm with Counsel or Procurement department on the ability to sole source items; Manage Bidder pre-qualification; Develop bidders list; Manage Bidders interest campaign; Publish Notices/Advertisements; Manage delivery of bid documents, Information for Bidders, Conduct Pre-bid Conferences and meetings, Bid openings and evaluation, and conduct Post bid interviews; Issue Addenda; Negotiate with Trades; Prepare Construction contracts; Issue Notice(s) to Proceed; Prepare Schedule Maintenance reports, Project Cost reports and Cash Flow reports.

Contract Administration:

Manage the bidder pre-qualification criteria; conduct the Pre-Bid conference; Evaluate Bids and make recommendation for award. Prepare construction contract. Manage the Risk Management Plan. Manage and resolve any bid protests.

CONSTRUCTION PHASE

Project Management:

Manage/Chair the Preconstruction Conference; Chair the regularly scheduled Construction Progress meeting; Oversee construction planning and execution; Identify potential construction issues and facilitate developing alternative solutions; Serve as liaison among the owner, designer, general contractor, the regulators, etc; Expedite/reinforce areas needing assistance; Facilitate communications among project team members; Ensure Requests For Information (RFIs) are answered on time. Implement and Update the Risk Management Plan.

Cost Management:

Review, if necessary, Negotiate Revisions to and Approve the general contractor's Schedule of Values; Manage the change orders and potential change orders; Evaluate potential claims; Approve cost estimates for negotiations and negotiate on behalf of the owner; Recommend change order settlement amounts to owner; Review weekly the expenditures and budget status; Manage the contingency; Submit a cost trending report.

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Time Management:

Continually monitor the construction schedule; Review the near term look ahead schedule and direct recovery action if appropriate; Review the near term (typically weekly) construction plan (and the look ahead schedule), compare them to the actual progress and overall schedule and take action to keep the construction on track, including recommendations for schedule recovery, if appropriate); Anticipate delays and take proactive action to prevent them; Prepare Time Impact Analysis of proposed and actual changes.

Quality Management:

Manage the assigned QC/QA duties ; Review QA tests at an appropriate frequency; Verify that there is appropriate evidence that factory tests were performed on equipment/materials used; Review and Accept field test reports prior to startup of facility; Visit the construction site routinely and review daily logs; Issue or confirm that the responsible party issues Non-compliance reports for defective work and review/approve proposed Corrective Action Plans; Verify that Record Drawings are kept current.

Contract Administration:

Plan and conduct the Preconstruction Conference; Assign responsibility for the owner-purchased materials and equipment; Verify that necessary permits, insurance, bonds, and labor affidavits are in place; Review systematically all contract and construction documentation/site records (e.g. field reports, QA reports, Nonconforming Work reports, Accident Reports, Proposed and actual Change Orders, Force Account (T&M) work, budget projections, Progress payments, Claims, RFIs,) so that procedures are being followed and to identify any areas that need attention or correction.

Safety Management:

Review/comment on the Job Hazard analysis; review/comment on the Safety Management Plan; Review all Accident Reports and confirm that appropriate remedial action is taken; Review Safety Audits; Attend the general contractor's weekly tailgate/toolbox safety meeting; Manage the Safety Committee; Manage the Owner Controlled Insurance Program ("OCIP").

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POST CONSTRUCTION PHASE:

Quality Management:

Review and cause Submittal of complete Record Drawings and Operation and Maintenance manuals; Ensure that the owner's Operations and Maintenance staff are given training, spare parts, test reports, such that they are trained to can operate and maintain the facility; Manage issues that may arise during the Warranty Period.

Contract Administration:

Prepare a Project Closeout Log to track outstanding items necessary to make the final payment to the GC including release of final retention, release of liens, receipt of spare parts; Negotiate the final close out change order, including settlement of all claims; Prepare list of Lessons Learned. Conduct Lessons learned meeting.

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