CITADEL DEVELOPMENT
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CITADELDEVGROUP.COM

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Owner Representative + Construction Management Matrix

Phase	Service	Action + Deliverable	Team Member	Tool	Fuel to Action | Value	Milestones
Planning	**Site Evaluation**	Site Characteristics Report		Google Doc	Early identification of Red Flags; opportunities	**Determine Project Go Forward** **Articulate Project Goals** **Full A&E Team Engaged**
	Project Scope Development	Project Plan + Scope		Google Doc	Detailed Plan with CP Milestones; identify potential risks	
	Architect / Engineer Selection	Design Team + Consultant Qualification and Interviews		Shared Notes	Determine Alignment; Energy + Personality	
	Conceptual Budgeting	Conceptual Budget		Shared Sheet	Use Historical Data + Vendor feedback	
	Consultant Management	Assist in building team; qualify		Various	"Shared Conciousness Meetings" - Collaborate + Align with Project Schedule: Remove Obstacles > Apply Pressure	
PreConstruction	**Consultant Management** *Designer & A/E*	Facilitate Meetings; maintain notes		Google Doc	"Shared Conciousness Meetings" - Collaborate + Align with Project Schedule: Remove Obstacles > Apply Pressure	**Approved Budget** **Approved Schedule** **Approved Permit** **Procurement Plan In Place** **Construction Team In Place** **Scope 95% Defined / Detailed**
	Budgeting	Organized Working Budget		Google Doc	Comprehensive & Transparent	
	Procurement & Supplier Management	Procurement Log; Pricing		Google Doc	"Shared Conciousness Meetings" - Collaborate + Align with Project Schedule: Remove Obstacles > Apply Pressure	
	Value Engineering			Google Doc	Get Creative, Stay Aligned With Project Goals	
	Critical Path Scheduling	Global Schedule Development		SmartSheets	Comprehensive & Transparent	
	GC Bidding & Selection	GC comparison; bid qualification		Google Doc	Ensure Completeness; Understand Philosophy; Check References	
Construction	**PreConstruction Meetings**	PreCon Meeting Coord		ProCore; Google Doc	"Shared Conciousness Meetings" - Collaborate + Align with Project Schedule: Remove Obstacles > Apply Pressure	**Safety Goals** **Schedule CPM Milestones Tracking** **Budget Tracking** **Completion Date** **Successful Turnover**
	Scope Review	Ensure Completeness				
	CP Schedule Management	Weekly Progress Meetings Coord; Schedule Maintenance		Smart Sheets	Track Meeting Notes; Articulate Project Goals **Hold Teams Accountable**	
	Project Reporting	Daily, Weekly Project Meetings + Reports; Issue Log		Google Docs > ProCore	Identify Progress, Risk, Opportunities "Shared Conciousness Meetings" - Collaborate + Align with Project Schedule: Remove Obstacles > Apply Pressure	
	Document Managment (Interim & Post)	Drawings; Change Order; RFI, Submittals, O&M Manuals, Waivers, Warranties		Procore; Google Docs	High Level of Capture, Organization, Distriubution, Visibility	
	Site Visits	Site Reports, Photographs		Procore; Google Docs	Articulate Project Goals; remove obstacles; nuances Ensure Quality Met **Hold Teams Accountable**	
	Pay App Review Qualification	Determine Accuracy of Pay Apps		Procore; Google Docs	Provide recommendation based on % completion	
	RFI Management	Maintain RFI Log > Distribute		Procore; Google Docs	Ensure distribution; maintain visibility; cover in meetings	
	OCO Review	Maintain OCO Log > Distribute		Procore; Google Docs	Qualify Against Scope / CD's	
	Conflict Review + Resolution	Issue Tracker; Email; Meetings		Procore; Google Docs	Win Win Situation + Hold Accountable	
	Punchlist	Compile, Distribute, Hold Accountable		Procore; Google Docs	Pressure To Complete Punchlist	