# QMP 5.2 - Accountability Matrix – Developer, Contractor original, version 1, and Designer, 2023-02-08

# [See QMP 5.2 Contractor HDZ for contractor version 2 (newest)]

**Developer Processes 2021-08-19** **By Shivraj Gill**; updated **2022-04-23**

| **A Summary #** | **B Summary Item Description****Developer** | **D Performed by: (resp. position first)** | **F Self Check complete (Initial & Date)**  | **H Agenda or Check List**  | **J Procedure** | **L Reviewed by: Position** | **M Reviewed Signature (Init & date)** |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Project name and number:** |
| 1 | Scope of the QMS |  |   |  |  |  |  |
| 1.1  | Organization’s Background |  |   |  |  |  |  |
|  |  |  |   |   |   |  |   |
|  |  |  |   |   |   |  |   |
| 1.3 | Approvals and Signatures |  |   |   |   |  |   |
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| 3 | Terms and Definitions  |  |   |   |   |  |   |
| 4 | Context of the Organization and Summary of Processes |  |   |   |   |   |   |
| 4.1 | Context of the Organization and Scope of QMS |  |   |   |   |  |   |
| 4.2 | Understanding the needs and expectations of Customers  |  |   |   |   |  |   |
| 4.3 | Scope of the QMS, and compliance strategy |  |   |   |   |  |   |
| 4.4 | Quality Management System and its processes |  |   |   |   |  |   |
| 4.4.01 | Business Development | MT & PM  |  |  |  | MT |  |
| 4.4.02 | Property Selection | MT |  |  |  | MT |  |
| 4.4.03 | Risk Assessment 1 | MT & TL |  |  |  | MT |  |
| 4.4.04 | Project Initiation 1 |  |  | Yes.  |  | MT  |  |
| 4.4.05 | **Project Team Development 1:** |  |  |  |  |  |  |
| 4.4.06 | Communication of Project Information |  |  |  |  |  |  |
| 4.4.07 | Intial Design |  |  |  |  |  |  |
| 4.4.08 | Preliminary Design |  |  |  |  |  |  |
| 4.4.09 | Public and City Meetings |  |  |  |  |  |  |
| 4.4.10 | Project Team Development 2 |  |  |  |  |  |  |
| 4.4.11 | Final Design (Development Permit and Building Permit) |  |  |  |  |  |  |
| 4.4.12 | Risk Assessment 2 |  |  |  |  |  |  |
|  | **End Design Phase, Start Construction Planning Phase** |  |  |  |  |  |  |
| 4.4.13 | Project Initiation 2 (Construction) |  |  |  |  |  |  |
| 4.4.14 | IFC Package Review |  |  |  |  |  |  |
| 4.4.15 | Estimating |  |  |  |  |  |  |
| 4.4.16 | Scheduling |  |  |  |  |  |  |
| 4.4.17 | Discussion of Quality Requirements for Trade Contractors suggested item |  |  |  |  |  |  |
| 4.4.17a | COMPANY Items to update after quality requirements are set. |  |  |  |  |  |  |
| 4.4.17b | COMPANY RFQ and Submittal Schedule |  |  |  |  |  |  |
| 4.4.18 | Project Work Break Down – suggested Item |  |  |  |  |  |  |
| 4.4.19 | Update Checklists and Work Methods – suggested Item |  |  |  |  |  |  |
| 4.4.20 | Personnel Evaluation and Training  |  |  |  |  |  |  |
| 4.4.21 | Send RFQ Package – suggested Item |  |  |  |  |  |  |
| 4.4.21a | Communication Template for RFQ. |  |  |  |  |  |  |
| 4.4.22 | Review Quotation and Quality Requirements Form |  |  |  |  |  |  |
| 4.4.23 | Pre-Award Meeting – suggested Item | DM. CM |   |   | QMP 8.7 | CEO |   |
| 4.4.24 | Selection of Trade Contractor |  |  |  |  |  |  |
|  | **End RFQ Phase, Start Post-Award Construction Phase** |  |  |  |  |  |  |
| 4.4.25 | Site Orientation Meeting |  |  |  |  |  |  |
| 4.4.26 | Submittals – suggested Item |  |  |  |  |  |  |
|  | **QMP 3.1.5 -** **Figure 9: RFQ Timeline and Process Flowchart.** |  |  |  |  |  |  |
|  | **End Post-Award Phase, Start Construction Phase**  |  |  |  |  |  |  |
| 4.4.27 | Calibration of Measurement Equipment |  |  |  |  |  |  |
| 4.4.28 | Pre-Activity or WM Review Meeting – suggested Item |  |  |  |  |  |  |
| 4.4.29 | Inspections |  |  |  |  |  |  |
|  | **Figure 10: Inspection Schedule during construction.** |  |  |  |  |  |  |
| 4.4.30 | Deficiencies |  |  |  |  |  |  |
|  | **COMPANY Deficiency Schedule Flowchart** |  |  |  |  |  |  |
| 4.4.31 | Trade Contractor Evaluation |  |  |  |  |  |  |
| 4.4.32 | Project Closure |  |  |  |  |  |  |
| 4.4.33 | Internal Audit and Review of Quality Plan |  |  |  |  |  |  |
|  | **End Post-Construction Phase.** **End Developer** |  |  |  |  |  |  |
| Section 5 |  Management Commitment |   |   |   |   |   |   |
| Section 6 |  Planning: Resources, Risks, Opportunities, and Objectives |   |   |   |   |   |   |
| Section 7 | Support |  |  |  |  | DM |   |
| Section 8.1 | Operational planning and control |  |  |  |  |  |  |
| Section 8.2 | Requirements for products and services |  |  |  |  |  |  |
| Section 8.3 | Design and development of products and services |  |  |  |  | DM |  |
| Section 8.4 | Control of externally provided processes, products and services |  |  |  |  |  |  |
| Section 8.5 | Production and service provision |  |  |  |  |  |  |
| Section 8.6 | Release of products and services |  |  |  |  |  |  |
| Section 8.7 | Control of nonconforming outputs |  |  |  |  | DM |  |
| Section 9 | Performance evaluation |  |  |  |  |  |  |
| Section 10 | Improvement |  |  |  |  |  |  |
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| **Discuss how to implement this QMP.** Recommend to be updated weekly and reported up the chain monthly! Evaluated by Quality Manager by mid-month**Using the QMP 5.2 Accountability Checklist:**The accountability matrix lists the responsibilities of all members of the project to each development task set outlined the quality plan. The Matrix breaks down the complex activities into simple actionable points. It ensures work is clearly defined into individual responsibilities and accountability. This checklist is controlled by the quality team and is updated when each task has been completed (or monthly as the way to establish accountability!!! For more detailed information on a task, all information is logged under the title and number as shown in the left-hand column. |
| \*\*Yellow highlight means that a line item will be dealt with in QMP 3.1.1 as that document has rows for the various subtrades. |

**End DEVELOPER** by Shivraj Gill

# QMP 5.2 - Accountability Matrix – Contractor - original, version 1;

# [Contractor -HDZ version 2 is in a different file].

**Version updated: 2023-01-18 (version control)**

|  | **Project Name****Project Number** |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Process #** |  **Process Description**Contractor |  | **Performed by: (resp. position first)** |  | **Self Check complete (Initial & Date)**  |  | **Agenda or Check List**  |  | **Procedure****(QMP)** | **Reviewed by: Position** | **Reviewed Signature (Init & date)** |
| 1 | Scope of ISO 9001 |  |  |  |   |  |  |  |  |  |  |
| 1.1, 1.2, 1.3 | Principles and Signatures |  | VP, Q Mgr |   |   |   |   |   |   | President |   |
| 2 |  Normative Ref. |  | N/A |   |   |   |   |   |   |  |   |
| 3 | Terms and Definitions  |  | N/A |   |   |   |   |   |   |  |   |
| 4 | Context of the Organization  |  | [Chapter title] |   |   |   |   |  |   |   |   |
| 4.1 | Context of the Contractor Organization,  |  | QM |   |   |   |   |  |   |  PM |   |
| 4.2 | Understanding the needs and expectations of Customers,  |  | QM |   |   |   |   |  |   |  PM |   |
| 4.3 | Scope of the QMS, and compliance strategy,  |  | QM |   |   |   |   |  |   |  PM |   |
| 4.4 | Contractor processes, summarized,  |  | QM |   |   |   |   |  |   |  PM |   |
| 4.4.01 | Business Development  |  | PM, QMgr |   |   |   |   |  |   | Const Mgr |   |
| **{Contractor: Project Pre-Award Phase}:** |  |  |  |  |  |  |  |  |  |  |
| 4.4.02 | Prime contract RFP / Bid Prep  |  | PM, Team Lead,  |   |   |   |   |   |   | Const Mgr |   |
| 4.4.03 | Bid - No Bid Risk Assessment |  | PM, Team Lead,  |   |   |   |   |   |   | Const Mgr |   |
| 4.4.04 | WBS, RFQ Quantity Take-off, Estimate **[Required item]** |  | Estimator, PM,  |   |   |   |   |   |   | Const Mgr |   |
| 4.4.05 | Subtrade RFQ Master and Quality Requirements, [Required item, including appropriate QMPs] |  | PM |   |   |   |  |   | QMPs .2.1, 2.2 and 2.5 | Const Mgr |   |
| 4.4.06 | QMP 3.1.1 Management of quality requirements, subbed or self-performed [Required item, including appropriate QMPs] |  | Estimator, PM,  |   |   |   |   |   | QMP 3.1.1, 3.1.2, 3.2 | Const Mgr |   |
| 4.4.07 | Scheduling, estimate phase |  | PM |   |   |   |   |   |   | Const Mgr |   |
|  |  |  |  |  |  |  |  |  |  |  |  |
| 4.4.08 | Subcontractor Request For Proposal (RFP) |  | PM |   |   |   |   |   |   | Const Mgr |   |
| 4.4.09 | Request For Quotation (RFQ)  |  | PM |   |   |   |   |   |   | Const Mgr |   |
| 4.4.10.1 | Staffing and resources for costing, etc |  | PM,  |   |   |   |   |   |   | Const Mgr |   |
| 4.4.10.2 | Site Plans, cranes, and equipment for costing |  |  |  |  |  |  |  |  |  |  |
| 4.4.10.3 | **Prime Contract Bid** Review and pre-signing meeting with Owner, [***QMP 3.2.1***](#_QMP_3.2_Pre-Award)  |  |  |  |  |  |  |  |  |  |  |

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| **Summary #** | **Summary Item Description**Contractor |  | **Performed by: (resp. position first)** |  | **Self Check complete (Initial & Date)**  |  | **Agenda or Check List**  | **)** | **Procedure** | **Reviewed by: Position** | **Reviewed Signature (Init & date)** |
| { **Contractor: Award of Prime Contract, acceptance, and Implementation Phase}:** |  |  |   |   |   |   |   |   |   |   |
| 4.4.11 | Project initiation, Job Start Checklist, Quality Plan Development for submittal.  |  | PM,  |   |   |   | Checklist req |   | QMP 5.1 Job Start Checklist | Const Mgr |   |
| 4.4.12 | 4.C.4.12 Team Formation and Transition Meeting:  |  | PM |   |   |   |  |   |  | Const Mgr |   |
| 4.4.13 | Personnel Training: (See [*QMP 7.1 Training*](#_QMP_7.1_-) (example) |  | PM |   |   |   |   |   |   |   |   |
| 4.4.14 | Project Controls, Metrics, Admin, Document Control and Communication: |  | PM,  |   |   |   |   |  |   | Const Mgr |   |
| 4.4.15 | Project documentation and specifications |  | QMgr |   |   |   | Agenda req'd |   | Procedure? | PM |   |
| 4.4.16 | Subcontracts signed after Prime Contract Award: |  | PM |   |   |   | Checklist req'd |   | QMP 5.3 and 5.4 for subs | Const Mgr |   |
|  | Contractor Design Review: (for D-B)  |  | PM,  |   |   |   | Agenda req’d |   | QMP 6.8 | Const Mgr |   |
|  | **{Contractor - Subcontractor Award Phase}** |  |  |  |  |  |  |  |  |  |  |
| 4.4.17 | [QMP 3.2.2 - Subcontractor - Pre-Award Meeting](#_QMP_3.2.2_-) |  |  PM, QMgr |   |   |   |   |   | QMP 3.2.2 | Const Mgr |   |
| 4.4.18 | Decision each scope: Subcontractor selection or GC Self-Perform |  |  |  |  |  |  |  | 3.2, 11.1 |  |  |
| 4.4.19 | QMP 4.1a Subcontractor Pre-Mobilization (Kickoff) Meeting (one Sub at a time): suggested  |  |  |  |  |  |  |  | QMP 4.1a |  |  |
| 4.4.20 | Quality checklist or ITP, and WMs written, where none exist: suggested |  | Sup, QMgr, Proj Coord |   |   |   | Checklist -  | ITP and checklist | QMP 11.1 |  |  |
| 4.4.21 | WM, ITP or Checklist update to meet drawings and specs. suggested |  | Sup, QMgr, Proj Coord |   |   |   | Checklist -  | ITP or checklist | QMP 3.1.2 QMP 4.2.1 | PM |   |
| 4.4.22 | QMP 2.2 or 2.5 Sub Quality Plan, suggested |  |  |  |  |  |  |  |  |  |   |
|  |  |  |  |  |  |  |  |  |  |  |  |
| 4.4.24 | Sub WM Review Meetings, both subs and self performed scopes suggested |  | Sup, QMgr |   |   |   | Agenda req'd |   | QMP 4.2 | PM |   |
| 4.4.25 | Initial Inspection suggested |  | Sup, QMgr |   |   |   |   | ITP and checklist | QMP 4.3 | PM |   |
| 4.4.26 | Inspection and records |  | Sup, QMgr |   |   |   |   |   |  QMP 8.1 | PM |   |
| 4.4.27 | Deficiency, nonconformances, and conformance: |  | Sup, QMgr |   |   |   |   |   | QMP 8.3 | PM |   |
| 4.4.28 | Project Schedule and Trade Meetings  |  | Sup, QMgr |   |   |   | Agenda req'd |   |   | PM |   |
| 4.4.29 | Change Management  |  | PM,  |   |   |   | Checklist req'd |   |   | Const Mgr |  |
| 4.4.30 | Audits  |  | QMgr  |   |   |   |   |   | QMP 9.1 | PM |   |
| 4.4.31 | [*QMP 10.1*](#_QMP_10.1_Subcontractor_1) *-* Sub Substantial Completion and Evaluation |  | Sup, QMgr |   |   |   | Checklist req'd |   | QMP 10.1, 10.2 | PM |   |
| 4.4.32 | [*QMP 10.2*](#_QMP_10.2_-) Subcontractor, WM and checklist Rating Log |  |  |  |  |  |  |  | QMP 10.2 |  |  |
| 4.4.33 | Project Plan achievements and lessons learned  |  | Sup, QMgr |   |   |   | Checklist req'd |   |   | PM |   |
| 4.4.34 | Project Closure: |  |  |  |  |  |  |  |  |  |  |
| Section 5 |  **Leadership:** Management Commitment,  |  |   |   |   |   |   |   |   |   |   |
| 5.1. 5.2, 5.3 | Customer Focus, Quality Policy, Position Descriptions |  | VP, Q Mgr |   |   |   |   |   |   | President |   |
| Section 6.1 |  **Planning:** Risks, Opportunities,  |  |   |   |   |   |   |   |   |   |   |
| 6.2 | Quality Objectives |  | VP, Q Mgr |   |   |   |   |   |   | President |   |
| Section 7 | Support: |  |  |  |  |  |  |  |  |  |   |
| Section 8 | **Operations:** |  |  |  |  |  |  |  |  |  |  |
| Section 8.1 | Operational planning and control\*\*\* |  |  |  |  |  |  |  | Planning WMs & ITPs |  |  |
| Section 8.2 | Requirements for products and services (Customer requirements)\*\*\* |  |  |  |  |  |  |  |  |  |  |
| Section 8.3 | Design and development  |  |  |  |  |  |  |  | QMP 6.1 |  |  |
| Section 8.4 | Control of externally provided processes, Suppliers and Subcontractors |  |  |  |  |  |  |  | QMPs 2.1, 2.5, 3.1.1, 3.1.2, 3.2, 5.4.1, 10.1 |  |  |
| Section 8.5 | Production and service provision |  |  |  |  |  |  |  | In-house WMs & ITPs |  |  |
| Section 8.6 | Release of products and services |  |  |  |  |  |  |  | Substantial completion |  |  |
| Section 8.7 | Control of nonconforming outputs |  |  |  |  |  |  |  | QMP 8.3 |  |  |
| Section 9 | Performance evaluation |  |  |  |  |  |  |  |  |  |  |
| Section 10 | Improvement |  |  |  |  |  |  |  |  |  |  |
| Date in column F means item is done and checked |
| Responsibilities are in priority, first position listed is prime position of responsibility, and therefore is accountable for it being done correctly. |
| **Discuss how to implement this QMP.** Recommend to be updated weekly and reported up the chain monthly! Evaluated by Quality Manager by mid-month |
| Discuss the fact that the rows and columns completed monthly are the way to establish accountability!!! |
| \*\*Yellow highlight means that a line item will be dealt with in QMP 3.1.1 as that document has rows for the various subtrades. |

**End QMP 5.2** **– Accountability Matrix – Contractor**

## 5.2 Accountability Matrix – Designer;

Columns H, J act to show the controlling elements!!!

| **A Summary #** | **B Summary Item Description**Designer | **C Level: Company or Project** | **D Performed by: (resp. position first)** |  | **F Self Check complete (Initial & Date)**  | **G**  | **H Agenda or Check List**  | **I** | **J Procedure** | **K Reviewed by: Position** | **L Reviewed Signature (Init & date)** |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Project name and number:** |  |
| 1 | Scope of the QMS |  |  |  |   |  |  |  |  |  |  |
| 1.1 | Organization’s Background |  | DM, CP |  |   |  |  |  |  |  |  |
| 1.2 or 5.2 | Quality Policy | Company | DM, CM |   |   |   |   |   |   | CEO |   |
| 1.3 or 6.2 | Quality Objectives | Company | DM, CM |   |   |   |   |   |   | CEO |   |
| 1.4 | Approvals and Signatures | Company | CEO, DM, CM |   |   |   |   |   |   | CEO |   |
| 2 | Table of Contents |   | N/A |   |   |   |   |   |   |  |   |
| 3 | Terms and Definitions – N/A |   | N/A |   |   |   |   |   |   |  |   |
| 4 | Context of the Organization and Summary of Processes |   | [Chapter title] |   |   |   |   |   |   |   |   |
| 4.1 | Context of the Organization and Scope of QMS |   | Arch, CM |   |   |   |   |   |   |  DM |   |
| 4.2 | Understanding the needs and expectations of Customers  |   | Arch, CM |   |   |   |   |   |   |  DM |   |
| 4.3 | Scope of the QMS, and compliance strategy |   | Arch, CM |   |   |   |   |   |   | DM |   |
| 4.4 | Quality Management System and its processes |   | Arch, CM |   |   |   |   |   |   | DM |   |
| 4.4.01 | Identify New Opportunities | Company | All |   |   |   |   |   |   | DM,CM |   |
| 4.4.02 | Bid – No Bid (Risk Assessment) | Company | Arch, PC, PM |   |   |   |   |   |   | DM, CM, PM, CEO |   |
| 4.4.03 | Collect Preliminary Customer Requirement | Project | Arch, PC |   |   |   |   |   |   | DM,CM |   |
| 4.4.04 | Contract Award | Project | Arch, PC |   |   |   |   |   |   | DM, CM |   |
| 4.4.05 | Develop Project Charter | Project | Arch, PC |   |   |   |   |   |  | DM, CM |   |
| 4.4.06 | Develop Project Plan | Project | Arch, PC |   |   |   |  |   |  | DM, CM |   |
| 4.4.07 | Develop Project Team | Project | Arch |   |   |   |   |   |   | DM |   |
| 4.4.08 | Concept Design | Project | Arch, PC |   |   |   |   |   | QMP 6.1 | DM,CM |   |
| 4.4.09 | Preliminary Design | Project | Arch, PC |   |   |   |   |   | QMP 6.1 and 6.2 and 6.3 | DM |   |
| 4.4.10 | Detail Design Input | Project | Arch, PC |   |   |   |   |   | QMP 6.1 | DM |   |
| 4.4.11 | Detail Design Development | Project | Arch, PC, Draftsman |   |   |   |  |   | QMP 6.1 | DM |   |
| 4.4.12 | Design Checking (Product Verification) | Project | PC, Draftsman |   |   |   |  |   | QMP 6.2 and 6.3 | Arch |   |
| 4.4.13 | Design Review (Product Validation) | Project | Arch |   |   |   |   |   | QMP 6.1, 6.2 | DM |   |
| 4.4.14 | Document Control | Project | PC, Draftsman |   |   |   |   |  | QMP 5.3.1 | Arch |   |
| 4.4.15 | Building Permit Application | Project | PC, Draftsman |   |   |   | Checklist req |   | WM 01 | Arch |   |
| 4.4.16 | Estimating | Project | Estimator |   |   |   |  |   | QMP 6.1 | Arch |   |
| 4.4.17 | Construction RFP and Tendering | Project | PC, Estimator |   |   |   |  |   | QMP 2.1and 2.2 and 2.5 | DM, CM |   |
| 4.4.18 | Project Construction Initiation | Project | PM |   |   |   |  |  | QMP 5.1  | CM |   |
| 4.4.19 | Construction Supervision | Project | PM |   |   |   |  |  | QMPs 2.2and 7.2 and 8.3 and 8.3.1 and 8.3.2 and 8.7 | CM |   |
| 4.4.20 | Managing Changes | Project | PM |   |   |   |  |   |  | CM |   |
| 4.4.21 | Project Verification |  Project | PM |   |   |   |  |   |  | CM |   |
| 4.4.22 | Project Closeout | Project | PM |   |   |   |  |   | QMP 10.1.1 | CM |   |
| 4.4.23 | Audit | Project | PC, PM |   |   |   |  |   | QMP 9.1 | DM,CM |   |
| 4.4.24 | Quality Management System Review Meeting | Project | DM. CM |   |   |   |   |  | QMP 8.7 | CEO |   |
| Section 5 |  Management CommitmentCustomer focusQuality policy |  DM, CM |   |   |   |   |   |   |   |   |   |
| Section 6 |  Planning: Risks, opportunities, and Objectives |  DM, CM |   |   |   |   |   |   |   |   |   |
| Section 7 | Support | Arch, CM |  |  |  |  |  |  |  | DM |   |
| Section 8.1 | Operational planning and control |  |  |  |  |  |  |  |  |  |  |
| Section 8.2 | Requirements for products and services | Arch, CM |  |  |  |  |  |  |  |  |  |
| Section 8.3 | Design and development of products and services | Arch |  |  |  |  |  |  |  | DM |  |
| Section 8.4 | Control of externally provided processes, products and services |  |  |  |  |  |  |  |  |  |  |
| Section 8.5 | Production and service provision |  |  |  |  |  |  |  |  |  |  |
| Section 8.6 | Release of products and services |  |  |  |  |  |  |  |  |  |  |
| Section 8.7 | Control of nonconforming outputs | Arch, CM |  |  |  |  |  |  |  | DM |  |
| Section 9 | Performance evaluation | DM, CM |  |  |  |  |  |  |  |  |  |
| Section 10 | Improvement |  |  |  |  |  |  |  |  |  |  |

**End QMP 5.2 – Accountability Matrix – Developer, Contractor, & Design**