

# Project Management III: Roles and Responsibilities of Members of the Contracting Team

June 2014

National Association of Elevator Contractors



# Contents

About this Study Guide .....	1
Expert Summary.....	2
On The Elevator Company Side .....	2
On the Customer Side .....	4

# About this Study Guide

This guide is intended to supplement your individualized Skillsoft learning by providing materials and examples specific to the vertical transport industry.

The learning objective for this study guide is for the student to be able to identify personnel, contractors, and project leaders involved in the project and the role of each.

Information included in this study guide is intended for educational purposes only. Check with your company for specific guidelines.



Skillsoft related lessons:

**Skillbriefs:** Planning Project Team Roles and Responsibilities ( PROJ\_25+A01\_BS);  
The Human Resource Management Plan (PROJ\_25\_a01\_bs)

# Expert Summary

## On The Elevator Company Side

POSITION	RESPONSIBILITIES
Manager/Owner	Oversees project from an executive standpoint. Responsible for providing the resources necessary to complete the work.
Salesperson/Estimator	Reviews specifications. Secures costs of labor and material. Validates assumptions, exclusions, inclusions, deviations. Prepares bid and ensures bid is in compliance with regulatory agencies and organizational policies.
Construction/Modernization/Project Manager	Reviews regulatory and contract safety practices with construction superintendent. Approves bids, negotiates with Customer Purchases material from Vendors and oversees procurement process. Oversees communication and quality management processes, schedule and budget control activities and other contract compliance issues. Manages workforce and work related personnel issues. Attends meetings as required, conforms to reporting requirements. Approves change orders and complies with change order directives specified in contracts.

POSITION	RESPONSIBILITIES
Construction Superintendent	<p>Monitors implementation of safety practices.</p> <p>Reviews specs and directs installation process in compliance with specs.</p> <p>Attends job meetings.</p> <p>Surveys job site to monitor work progress and site needs.</p> <p>Manages installers on site work schedule and processes.</p> <p>Participates in the material procurement and inspection process .</p> <p>Reports regularly to the Project Manager.</p>
Installers-Install Equipment: Foreman, Mechanics, Apprentices	<p>Implements all safety practices.</p> <p>Reviews specifications regularly.</p> <p>Installs elevator/modifies elevator as directed by specifications.</p> <p>Identifies variances between delivered materials and specifications.</p> <p>Communicates regularly with superintendent.</p>

## On the Customer Side

POSITION	RESPONSIBILITIES
General Contractor	<p>Hired by the owner and is responsible for the entire project.</p> <p>Hires the subcontractors including elevators, electricians, plumbers.</p> <p>Develops, implements and manages master project management plan including management of work progress, schedule, budget, quality, risk, communications, procurement, and stakeholders.</p>
Architect	<p>Designs the building and may provide specs.</p>
Consultant	<p>Consultant may provide specifications and progress reports / final inspections.</p> <p>Monitors the installation progress and confirms specification conformity.</p>
Construction Manager/Superintendent	<p>Monitors implementation of safety practices.</p> <p>Hired as the Owner's Representative.</p> <p>Reviews specs and directs construction process in compliance with specs.</p> <p>Responsible for the day to day operations of a construction job.</p> <p>Oversees communication and quality management processes, schedule and budget control activities and other contract compliance issues.</p> <p>Attends meetings as required, conforms to reporting requirements.</p> <p>Communicates with General Contractor.</p>
Elevator Inspector	<p>Responsible for inspecting the elevator at completion and confirming code/safety conformity.</p> <p>Inspectors have the final say regarding the safety of the elevator for public use.</p>

**No other reference documents or examples.**

**Final exercise questions will be based on:**

The expert summary