



Project Manager Occupational Standards



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About the Electricity Sector Council

Approximately 100,000 Canadians are involved in the generation, transmission and distribution of one of our country's essential utilities: electricity. Their work powers homes and businesses across the country, fuelling everything from light bulbs, cell phones and refrigerators to water treatment plants and road vehicle assembly lines.

The Electricity Sector Council provides support to this dedicated team by working with industry employers and other stakeholders to research and resolve human resource and workplace development issues.

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Project Manager Occupational Analysis Profile

Disclaimer: Please note that some of the tasks detailed in this document will require the services of a registered trades-person depending upon the province of work. Provincial regulations change from time to time, employers and employees should consult your provincial appropriate licensing authority for clarification regarding which tasks may be affected. It is the responsibility of the individual employer/employee to ensure they act within the regulation for their jurisdiction.

A Lead Projects

A.1	A.2	A.3	A.4	A.5	A.6
Make decisions	Identify opportunities and solve problems	Take responsibility	Establish and maintain standards	Mentor others	Facilitate quality improvement
A.7	A.8	A.9	A.10	A.11	A.12
Promote open, honest communication	Demonstrate commitment	Maintain schedules	Seek assistance when needed	Facilitate change in all project aspects	Convey financial updates

B Plan and Schedule

B.1	B.2	B.3	B.4	B.5	B.6
Read and follow contracts	Develop project charter	Review scope of project	Establish project organization	Estimate time/schedule	Develop and present work plan
B.7	B.8	B.9			
Meet regulatory requirements	Establish procurement strategies	Estimate impacts of change requests			

C Manage Projects

C.1	C.2	C.3	C.4	C.5	C.6
Initiate project	Monitor schedule	Set goals and objectives	Manage risk	Monitor project activities	Delegate
C.7	C.8	C.9	C.10	C.11	C.12
Ensure worker, contractor and public safety	Ensure environmental protection	Interpret statistical data	Implement quality management	Maintain project reporting	Document project activities
C.13	C.14	C.15			
Evaluate project	Sign off projects	Develop and oversee mitigation and compensation plans			

D Manage Finances

D.1	D.2	D.3	D.4	D.5
Develop budgets	Forecast/Create monthly expenditure chart	Manage financial resources	Adjust project costs for change requests	Articulate financial performance

E Communicate

E.1	E.2	E.3	E.4	E.5	E.6
Establish communication plan	Make presentations	Simplify complex information	Articulate the overall plan	Listen	Speak effectively

E.7	E.8	E.9	E.10	E.11	E.12
Respect cultural diversity	Present project to media	Use communication technology	Communicate with department heads and staff	Communicate with stakeholders	Adhere to principles of confidentiality

E.13	E.14	E.15
Define project terminology	Negotiate	Build strategic relationships

F Manage Human Resources

F.1	F.2	F.3	F.4	F.5	F.6
Establish human resource needs	Recruit staff	Build teams	Evaluate staff	Comply with individual and group contracts	Manage relationships

F.7	F.8
Encourage continuous learning	Discipline/dismiss staff

G Develop Personal Competencies

G.1	G.2	G.3	G.4	G.5	G.6
Establish ethics and integrity	Display interpersonal skills	Ask insightful questions	Work safely	Judge personal performance	Seek mentors

G.7	G.8	G.9
Establish a good work/life balance	Develop and maintain skills	Establish record of success

Project Manager Occupational Standards

Area of Competence A: Lead Projects

Task A.1: Make decisions

Sub-tasks:	Supporting Knowledge and Abilities:
a) Apply training to analyze situations and answer questions	<ul style="list-style-type: none"> • Draw upon previous work and project experience • Refer to historical data
b) Gain confidence from experience	<ul style="list-style-type: none"> • Seek information and guidance from others (e.g., mentors, etc.)
c) Research solutions	<ul style="list-style-type: none"> • Access regulatory bodies' websites (e.g., standards, requirements, forms) for reputable research • Contact internal and external expertise
d) Make decisions based on facts	<ul style="list-style-type: none"> • Follow industry practices and common sense
e) Be able to support decisions	<ul style="list-style-type: none"> • Possess courage to act • Gather appropriate data and requirements • Be able to sell the decision to other working groups
f) Modify decisions when necessary	<ul style="list-style-type: none"> • Use new information to make decisions, when information becomes available

Task A.2: Identify opportunities and solve problems

Sub-tasks:	Supporting Knowledge and Abilities:
a) Define the problem or opportunity	<ul style="list-style-type: none"> • Draw on resources and expertise to define and identify problems or opportunities
b) Weigh the options	<ul style="list-style-type: none"> • Identify priorities (e.g., safety, financial, and schedule)
c) Choose a path	<ul style="list-style-type: none"> • Reflect business case and requirements
d) Implement solution	
e) Track solution	<ul style="list-style-type: none"> • Monitor progress and change
f) Evaluate solution	<ul style="list-style-type: none"> • Determine effectiveness of solution • Propose new solutions as necessary

Task A.3: Take responsibility

Sub-tasks:	Supporting Knowledge and Abilities:
a) Enforce safety standards for self and others	<ul style="list-style-type: none"> • Apply Occupational Health and Safety requirements • Company safety guidelines • Most stringent safety requirements prevail • Ensure all workers are properly trained
b) Enforce environmental policies regulations	<ul style="list-style-type: none"> • e.g., federal, provincial and company environmental guidelines • e.g., obtain permits • Adhere to Aboriginal requirements
c) Monitor and manage quality of work	<ul style="list-style-type: none"> • Self-audit performance to determine if objectives are being met
d) Apply due diligence	
e) Make informed decisions	<ul style="list-style-type: none"> • Back-up decisions with research

Task A.4: Establish and maintain standards

Sub-tasks:	Supporting Knowledge and Abilities:
a) Establish benchmark expectations	
b) Monitor that standards are being maintained	<ul style="list-style-type: none"> • e.g., ensure inspections are being conducted, time sheets being completed, etc.
c) Re-establish expectations when standards are not being met	<ul style="list-style-type: none"> • Ensure workers are aware of your expectations

Task A.5: Mentor others

Sub-tasks:	Supporting Knowledge and Abilities:
a) Tune into individual needs and skills	<ul style="list-style-type: none"> • Observe behaviours and patterns to identify areas requiring improvement and strengths
b) Guide protégé	<ul style="list-style-type: none"> • Check in periodically to provide assistance • Do not attempt to direct • Allow protégé to complete tasks in their own way, within guidelines, to foster personal growth and to gain experience
c) Provide encouragement and constructive feedback	
d) Hone your mentoring techniques	<ul style="list-style-type: none"> • Evaluate effectiveness as a mentor • Teach others how to effectively mentor

Task A.6: Facilitate quality improvement

Sub-tasks:	Supporting Knowledge and Abilities:
a) Seek out alternate methods of construction and new technologies	<ul style="list-style-type: none"> • To facilitate efficient use of human resources and materials • To improve cost, safety and environment
b) Eliminate or control risk	<ul style="list-style-type: none"> • e.g., physical/safety risks, business risks (liability)
c) Ensure new methods and technologies are incorporated into future projects	
d) Broadcast and discuss quality issues amongst team members	

Task A.7: Promote open, honest communication

Sub-tasks:	Supporting Knowledge and Abilities:
a) Lead by example	<ul style="list-style-type: none"> • Model behaviours expected from others
b) Set policies to outline rules and regulations	<ul style="list-style-type: none"> • Refer to various appropriate codes of ethics

Task A.8: Demonstrate commitment

Sub-tasks:	Supporting Knowledge and Abilities:
a) Lead by example	<ul style="list-style-type: none"> • e.g., actions and words
b) Set high standards and expectations	

Task A.9: Maintain schedules

Sub-tasks:	Supporting Knowledge and Abilities:
a) Involve others to manage and maintain schedule	<ul style="list-style-type: none"> • Draw on external expertise (e.g., contractors) • Involve team to manage and maintain schedule
b) Follow schedules, timelines, etc. to meet project milestones	<ul style="list-style-type: none"> • Keep others (e.g., project team, sponsors, etc.) informed of status of project and consequences of their actions to entire project schedule • Hold regular update meetings to discuss schedule progression • Highlight and maintain critical path
c) Look ahead and forecast	<ul style="list-style-type: none"> • Keep the ‘big picture’ in mind • Keep whole project in perspective • Manage float • Consider safety, environment and quality
d) Gain trust, confidence and consent to complete work as efficiently as possible	<ul style="list-style-type: none"> • Do not create arbitrary deadlines

Task A.10: Seek assistance when needed

Sub-tasks:	Supporting Knowledge and Abilities:
a) Recognize limits of own abilities, skills and knowledge	
b) Seek out others with needed expertise	<ul style="list-style-type: none"> • Ensure you involve team members with a wide range of ideas and capabilities
c) Ensure that support staff are in place and empowered in the event of an unexpected absence	<ul style="list-style-type: none"> • Ensure supportive individuals have complimentary skill sets, authority and expertise

Task A.11: Facilitate change in all project aspects

Sub-tasks:	Supporting Knowledge and Abilities
a) Define the change strategies	<ul style="list-style-type: none"> • Identify: <ul style="list-style-type: none"> ○ Stakeholders impacted by change ○ What key issues stakeholders are dissatisfied about ○ How stakeholders feel about the planned changes ○ What resistance will have to be overcome • Select key issues that can realistically be altered • Develop change strategies that include: <ul style="list-style-type: none"> ○ What assumptions have to change ○ Ways to overcome resistance to change
b) Communicate change details	<ul style="list-style-type: none"> • Define new expectations
c) Communicate successful changes	<ul style="list-style-type: none"> • Reward and acknowledge successful changes
d) Measure change progress	<ul style="list-style-type: none"> • Employ proper method to measure and monitor progress
e) Identify unsuccessful change	<ul style="list-style-type: none"> • Take appropriate action to resolve situation
f) Ensure change lasts	<ul style="list-style-type: none"> • Foster organizational persistence and follow through with successful changes
g) Provide feedback	
h) Orientate new team members	<ul style="list-style-type: none"> • Clearly identify their roles in the project

Task A.12: Convey financial updates

Sub-tasks:	Supporting Knowledge and Abilities
a) Convey regular budget updates	<ul style="list-style-type: none"> • Explain changes to scope and schedule

Area of Competence B: Plan and schedule

Task B.1: Read and follow contracts

Sub-tasks:	Supporting Knowledge and Abilities:
a) Read and understand all aspects of the contract	<ul style="list-style-type: none"> • Access specialists, when necessary
b) Locate clauses that could be damaging to the company	<ul style="list-style-type: none"> • e.g., one-sided liquidated damages clauses
c) Check for changes made to contract in period between bid and contract signing	
d) Negotiate with sub-contractors and suppliers	<ul style="list-style-type: none"> • May secure letter of intent previous to issuing and signing off on contract
e) Sign sub-contracts	

Task B.2: Develop project charter

Sub-tasks:	Supporting Knowledge and Abilities:
a) State scope, cost, schedule, objectives and participants in the project	
b) Delineate roles and responsibilities	
c) Outline project objectives	
d) Identify main stakeholders	
e) Define authority of project manager	

Task B.3: Review scope of project

Sub-tasks:	Supporting Knowledge and Abilities:
a) Specify requirements for end result	<ul style="list-style-type: none"> • Ensure project team has a thorough understanding of requirements • Document what is outside of scope
b) Define what project is supposed to accomplish	
c) Describe what end result should be	
d) Revise methodology used to complete scope of the project, if necessary	

Task B.4: Establish project organization

Sub-tasks:	Supporting Knowledge and Abilities:
a) Establish organization chart	
b) Ensure exact job descriptions are available for each individual on organization chart	<ul style="list-style-type: none"> • Outline of duties and responsibilities • Ensure job descriptions are reviewed with and understood by each worker
c) Ensure that all workers are aware of their responsibilities for the current project	<ul style="list-style-type: none"> • Resolve misunderstandings regarding responsibilities

Task B.5: Estimate time/schedule

Sub-tasks:	Supporting Knowledge and Abilities:
a) Identify all tasks needed to produce each deliverable	
b) Estimate work effort required to complete each task	
c) Develop a resource list	<ul style="list-style-type: none"> • Take into consideration availability of each resource
d) Use estimates and resources list to develop project schedule	<ul style="list-style-type: none"> • Use scheduling software, if required (e.g., Microsoft Project) • Create, for example: <ul style="list-style-type: none"> ○ Gantt Charts
e) Adjust schedule as needed	

Task B.6: Develop and present work plan

Sub-tasks:	Supporting Knowledge and Abilities:
a) Identify what work will be performed	<ul style="list-style-type: none"> • Describe major products/deliverables
b) Identify who will be involved in the project	<ul style="list-style-type: none"> • Describe responsibilities • Describe how human resources will be organized
c) Create work breakdown structure	<ul style="list-style-type: none"> • Brainstorm all project deliverables • Record deliverables • Arrange deliverables into groups under major areas of activity • Add, modify, remove and shuffle the deliverables until WBS is accurate, complete and logical
d) Identify project timelines	<ul style="list-style-type: none"> • Identify when particularly meaning points (milestones) will be completed • Use project management software, if required (e.g., Microsoft Project)
e) Present work plan to workforce	

Task B.7: Meet regulatory requirements

Sub-tasks:	Supporting Knowledge and Abilities:
a) Identify what licenses and permits must be secured	<ul style="list-style-type: none"> • e.g., federal, provincial, municipal
b) Apply for connection with grid authority	<ul style="list-style-type: none"> • Establish associated costs
c) Apply for necessary approvals	<ul style="list-style-type: none"> • Pay applicable fees
d) Gain approvals	
e) Provide for inspections	

Task B.8: Establish procurement strategies

Sub-tasks:	Supporting Knowledge and Abilities:
a) Gather information about servicers and suppliers	<ul style="list-style-type: none"> • Pre-qualify servicers and suppliers
b) Make contact with potential servicers and suppliers	<ul style="list-style-type: none"> • Release, for example: <ul style="list-style-type: none"> ○ Requests for Quotation (RFQ) ○ Requests for Proposals (RFP) ○ Requests for Information (RFI) ○ Requests for Tender (RFT)
c) Negotiate on price, availability and customization possibilities	<ul style="list-style-type: none"> • For example, on: price, availability and customization of resources, delivery schedules
d) Engage contract servicers and suppliers	<ul style="list-style-type: none"> • Review documentation
e) Monitor servicers and suppliers	<ul style="list-style-type: none"> • Make changes as necessary • Provide feedback, as required

Task B.9: Estimate impacts of change requests

Sub-tasks:	Supporting Knowledge and Abilities:
a) Consider impact of variables on cost for change requests	<ul style="list-style-type: none"> • Including: <ul style="list-style-type: none"> ○ Resource quantities ○ Labour rates ○ Material rates ○ Equipment required ○ Cost escalation ○ Indirect costs ○ Profit
b) Consider impact of variables on schedule for change requests	
c) Gain sponsor agreement for change requests	<ul style="list-style-type: none"> • Ensure sponsor is aware of scope ramifications created by change request

Area of Competence C: Manage Projects

Task C.1: Initiate project

Sub-tasks:	Supporting Knowledge and Abilities:
a) Define the project	<ul style="list-style-type: none"> • Including: <ul style="list-style-type: none"> ○ What the project will include ○ What the project will not include ○ Indicators of project completion
b) Create a project initiation document	<ul style="list-style-type: none"> • Including: <ul style="list-style-type: none"> ○ Project definition ○ Project justification ○ Proposed expenditures and timelines ○ Organization and responsibilities ○ Risk management policy ○ Quality control standards

Task C.2: Monitor schedule

Sub-tasks:	Supporting Knowledge and Abilities:
a) Constantly review schedule	
b) Modify schedule as required	
c) Control float	
d) Monitor critical path and milestones	

Task C.3: Set goals and objectives

Sub-tasks:	Supporting Knowledge and Abilities:
a) Define goals and objectives	<ul style="list-style-type: none"> • Goals and objectives are statements that describe what the project will accomplish <ul style="list-style-type: none"> ○ Goals are statements that provide overall context for what the project is trying to achieve ○ Objectives are statements that describe the specific, tangible deliverables that the project will deliver
b) Set goals and objectives	<ul style="list-style-type: none"> • Ensure goals are: <ul style="list-style-type: none"> ○ Realistic (within resources and time available) ○ Specific ○ Measurable (well defined, with benchmarks) ○ Time based
c) Gain agreement	<ul style="list-style-type: none"> • Agreed upon by all stakeholders and those that are involved in reaching the goals and objectives
d) Monitor and report on goals and objectives	

Task C.4: Manage risk

Sub-tasks:	Supporting Knowledge and Abilities:
a) Evaluate risk	<ul style="list-style-type: none"> • Techniques to identify risk include: <ul style="list-style-type: none"> ○ Brainstorming sessions ○ Regular team meetings ○ Review with interested parties (e.g., end users, owners) ○ Experience from previous projects
b) Qualify risk	<ul style="list-style-type: none"> • Evaluate as to likelihood and severity • Grade as to high, medium or low
c) Develop risk management plan	<ul style="list-style-type: none"> • Develop more than one alternative plan of action • Assign contingencies (e.g., time and cost)
d) Monitor all possible areas of risk	<ul style="list-style-type: none"> • Eliminate all risks, if possible
e) Take corrective action	
f) Document all risks and corrective action taken	<ul style="list-style-type: none"> • List all risks handled, establish severity of risk, description of corrective action and cost incurred • Include all risks encountered and corrective action on progress reports

Task C.5: Monitor project activities

Sub-tasks:	Supporting Knowledge and Abilities:
a) Conduct site visits and inspections frequently	
b) Conduct regular progress review meetings	<ul style="list-style-type: none"> • Evaluate, for example: safety, progress, etc.

Task C.6: Delegate

Sub-tasks:	Supporting Knowledge and Abilities:
a) Distribute work to appropriate team members	<ul style="list-style-type: none"> • Ensure team member is capable of handling assigned tasks
b) Establish levels of authority	<ul style="list-style-type: none"> • Ensure workers are aware of their level of involvement in decision-making
c) Monitor work activity	<ul style="list-style-type: none"> • Conduct regular meetings and employee evaluations
d) Provide feedback	

Task C.7: Ensure worker, contractor and public safety

Sub-tasks:	Supporting Knowledge and Abilities:
a) Provide proper training and equipment	<ul style="list-style-type: none"> • Review appropriate certifications • Arrange for proper training • Set up a Joint Health and Safety Committee
b) Establish and review safety management plan with staff, contractors and stakeholders	
c) Facilitate/arrange regular safety audits and site visits	
d) Conduct daily tail-board/Toolbox meetings	
e) Provide recognition or discipline as required	
f) Investigate safety related incidents	<ul style="list-style-type: none"> • Complete necessary documentation
g) Implement corrective action, as required	

Task C.8: Ensure environmental protection

Sub-tasks:	Supporting Knowledge and Abilities:
a) Provide proper training and equipment	<ul style="list-style-type: none"> • Review appropriate certifications • Arrange for proper training
b) Establish and review environmental protection plan with staff, contractors and stakeholders	
c) Facilitate/arrange regular environmental audits and site visits	
d) Provide recognition or discipline as required	

Task C.9: Interpret statistical data

Sub-tasks:	Supporting Knowledge and Abilities:
a) Understand project schedule	<ul style="list-style-type: none"> • e.g., Gantt chart
b) Interpret financial reporting	
c) Recognize significance of changes in data	<ul style="list-style-type: none"> • Technical reports • Request assistance from technical experts, if required

Task C.10: Implement quality management

Sub-tasks:	Supporting Knowledge and Abilities:
a) Establish benchmarks for performance	<ul style="list-style-type: none"> • e.g., ISO, Quality Connection
b) Meet performance benchmarks	
c) Monitor quality of workmanship on-site	
d) Monitor quality of suppliers and sub-contractors	<ul style="list-style-type: none"> • e.g., factory acceptance testing

Task C.11: Maintain project reporting

Sub-tasks:	Supporting Knowledge and Abilities:
a) Complete regular reporting	<ul style="list-style-type: none"> • e.g., tail-boards, test reports, packing slips, site audits • Ensure documents are filed accordingly
b) Set up project communication plan	<ul style="list-style-type: none"> • e.g., to conduct site visits

Task C.12: Document project activities

Sub-tasks:	Supporting Knowledge and Abilities:
a) Establish document control procedures	<ul style="list-style-type: none"> • e.g., file management, drawing management, design and engineering details, e-mails

Task C.13: Evaluate project

Sub-tasks:	Supporting Knowledge and Abilities:
a) Conduct regular reviews	
b) Conduct internal lessons learned meeting with staff and sub-contractors	<ul style="list-style-type: none"> • Point out positive actions and areas for improvement
c) Conduct close-out meeting	
d) Conduct final evaluation with client	

Task C.14: Sign off projects

Sub-task:	Supporting Knowledge and Abilities:
a) Complete required administrative tasks	
b) Archive project materials	<ul style="list-style-type: none"> • Examples of project materials include: <ul style="list-style-type: none"> ○ Project charter ○ Detailed project plan ○ Schedules ○ Status reports ○ Provides an audit of the history and evolution of the project
c) Supply customer with appropriate project documentation	<ul style="list-style-type: none"> • e.g., as-built drawings, maintenance manuals
d) Ensure all invoices have been collected and bills paid	
e) Conduct performance reviews and skills inventory for project team	<ul style="list-style-type: none"> • Provide team members with feedback on their performance and accomplishments

Task C.15: Develop and oversee mitigation and compensation plans

Sub-task:	Supporting Knowledge and Abilities:
a) Investigate and analyze unusual problems	
b) Develop consultation methods to deal with resolution of complex and diverse issues	• Adjust methods as necessary
c) Find best solution	

Area of Competence D: Manage Finances

Task D.1: Develop budgets

Sub-tasks:	Supporting Knowledge and Abilities:
a) Refer to estimates presented during project initiation	
b) Refer to budget information from similar projects	<ul style="list-style-type: none"> Consult with project team and stakeholders who have worked on similar projects to refer to past budgets to identify costs
c) Identify detailed labour costs associated with project tasks	<ul style="list-style-type: none"> Apply labour rates to detailed tasks, staff efforts and durations in the project schedule Include costs needed to acquire sub-contractors
d) Identify detailed material costs	<ul style="list-style-type: none"> Refer to procurement plans that include costs associated with acquiring equipment, materials, and other non-staff resources
e) Identify ongoing operating costs	<ul style="list-style-type: none"> If needed, determine rates for ongoing operational costs associated with project's product or service
f) Identify other specific costs	<ul style="list-style-type: none"> Including potential expenses for travel, interest, etc.
g) Build in contingencies	<ul style="list-style-type: none"> e.g., owner contingency, project contingency Assess probability of exceeding costs Normal for overall contingency to be percentage of total project cost based on completeness of design
h) Obtain funding approval	

Task D.2: Forecast/Create monthly expenditure chart

Sub-tasks:	Supporting Knowledge and Abilities:
a) Prepare cash flow projection for duration of the project	
b) Monitor and up-date projections as required	<ul style="list-style-type: none"> • Compare actual versus projected expenditures

Task D.3: Manage financial resources

Sub-tasks:	Supporting Knowledge and Abilities:
a) Prepare payment certificates for invoicing	<ul style="list-style-type: none"> • Ensure invoicing requirements are met, e.g., monthly, by milestones
b) Ensure supplier and sub-trade invoices are made on time	<ul style="list-style-type: none"> • Ensure sub-trades submit statutory declarations and WSIB certificates
c) Obtain approval from client for invoicing	
d) Issue final invoice	<ul style="list-style-type: none"> • Submit statutory declaration

Task D.4: Adjust project costs for change requests

Sub-tasks:	Supporting Knowledge and Abilities:
a) Input cost of each project task	<ul style="list-style-type: none"> • Use work breakdown structure to isolate elements
b) Adjust estimates with changes in project scope	<ul style="list-style-type: none"> • Create change requests for changes in projected costs
c) Use expertise and experience of others on the team	
d) Agree to tolerances for undefined work	
e) Provide regular budget statements to all concerned	<ul style="list-style-type: none"> • Budget to show most current position and any estimated budget changes
f) Gain funding approval	

Task D.5: Articulate financial performance

Sub-tasks:	Supporting Knowledge and Abilities:
a) Understand financial reporting system	
b) Recognize anomalies or variances	<ul style="list-style-type: none"> • Compare projected and actual figures • Determine reasons for anomalies and variances
c) Justify financial performance	<ul style="list-style-type: none"> • Provide financial reports, relevant details or information
d) Interpret financial reports	<ul style="list-style-type: none"> • Understand to whom you are presenting information

Area of Competence E: Communicate

Task E.1: Establish communication plan

Sub-tasks:	Supporting Knowledge and Abilities:
a) Establish points of contact between self and stakeholders	<ul style="list-style-type: none"> • Avoid parallel paths • Communicate process to all staff
b) Establish communication protocols	<ul style="list-style-type: none"> • e.g., e-mail correspondence

Task E.2: Make presentations

Sub-tasks:	Supporting Knowledge and Abilities:
a) Be prepared	<ul style="list-style-type: none"> • Practice presentation
b) Know your audience	<ul style="list-style-type: none"> • Use appropriate terminology
c) Use appropriate media	<ul style="list-style-type: none"> • e.g., electronic presentation software
d) Allow time for input	
e) Develop a clear and concise message	
f) Engage your audience	<ul style="list-style-type: none"> • Make eye contact
g) Use proper speaking skills	<ul style="list-style-type: none"> • Ensure audience understanding • Speak clearly, concisely and slowly • Be aware of body language and tone of delivery

Task E.3: Simplify complex information

Sub-tasks:	Supporting Knowledge and Abilities:
a) Break information into understandable units	<ul style="list-style-type: none"> • To ensure audience comprehension
b) Use understandable language	<ul style="list-style-type: none"> • Explain or avoid industry jargon and acronyms
c) Affirm audience understanding	<ul style="list-style-type: none"> • Ask questions
d) Write to reader's level of understanding and knowledge	<ul style="list-style-type: none"> • Use appropriate level of terminology
e) Review and revise meeting minutes	<ul style="list-style-type: none"> • Clarify notes and technical terminology

Task E.4: Articulate the overall plan

Sub-tasks:	Supporting Knowledge and Abilities:
a) Communicate to team members their contribution/involvement in the project	<ul style="list-style-type: none"> • How their activities impact the overall success of the project
b) May act as project spokesperson to the general public	<ul style="list-style-type: none"> • Provide correct level and amount of detail • Identify benefits of project

Task E.5: Listen

Sub-tasks:	Supporting Knowledge and Abilities:
a) Give speaker undivided attention	
b) Allow speaker to finish message before responding	<ul style="list-style-type: none"> • Do not interrupt speaker
c) Clarify or confirm information	<ul style="list-style-type: none"> • Validate by rephrasing
d) Ask questions in a respectful manner	<ul style="list-style-type: none"> • If message not clear or understood

Task E.6: Speak effectively

Sub-tasks:	Supporting Knowledge and Abilities:
a) Organize thoughts before speaking	
b) Keep message clear and focused	
c) Use appropriate body language	
d) Use appropriate volume and tone of voice	
e) Use appropriate language	
f) Confirm understanding	<ul style="list-style-type: none"> • Ask questions

Task E.7: Respect cultural diversity

Sub-tasks:	Supporting Knowledge and Abilities:
a) Recognize gender and generation issues	
b) Recognize norms and practices of ethnic groups	
c) Complete cross-cultural training, if required	

Task E.8: Present project to media

Sub-tasks:	Supporting Knowledge and Abilities:
a) Ensure message is brief and concise	<ul style="list-style-type: none"> • Present correct level of detail
b) Defer questions to others, when necessary	<ul style="list-style-type: none"> • Do not speak on behalf of other parties
c) Ensure corporate policies and procedures are followed	

Task E.9: Use communication technology

Sub-tasks:	Supporting Knowledge and Abilities:
a) Familiarize self with equipment and technology	<ul style="list-style-type: none"> • For example: <ul style="list-style-type: none"> ○ Telephone ○ Two-way radio ○ Fax machine ○ E-mail
b) Select appropriate equipment	
c) Comply with applicable standards, policies and procedures	
d) Convey message clearly and concisely	
e) Use company website to convey information	

Task E.10: Communicate with department heads and staff

Sub-tasks:	Supporting Knowledge and Abilities:
a) Conduct regular meetings	<ul style="list-style-type: none"> • e.g., weekly project meetings
b) Maintain contact with department heads	<ul style="list-style-type: none"> • e.g., financial, engineering, operations
c) Create communication vehicles to inform staff of project progress	<ul style="list-style-type: none"> • e.g., newsletters, web-site, pictures

Task E.11: Communicate with stakeholders

Sub-tasks:	Supporting Knowledge and Abilities:
a) Identify project stakeholders	
b) Understand your customers' businesses	
c) Agree upon deliverables	<ul style="list-style-type: none"> • Ensure clear understanding regarding quality and composition of each deliverable
d) Relay information throughout the project	<ul style="list-style-type: none"> • Ensure project team and stakeholders have all necessary information throughout the project
e) Participate in community activities	<ul style="list-style-type: none"> • Use professional skills

Task E.12: Adhere to principles of confidentiality

Sub-task:	Supporting Knowledge and Abilities:
a) Recognize materials and information that should be kept confidential	<ul style="list-style-type: none"> • Ensure that contract is read for confidentiality parameters
b) Follow company policies and procedures regarding the use and distribution of confidential materials and information	<ul style="list-style-type: none"> • Ensure all team members and stakeholders adhere to company policies and procedures
c) Ensure all relevant materials and information is clearly identified as being confidential	

Task E.13: Define project terminology

Sub-tasks:	Supporting Knowledge and Abilities:
a) Develop a glossary of terms and acronyms	
b) Define meaning of terms	<ul style="list-style-type: none"> • e.g., tail-board/Toolbox meetings

Task E.14: Negotiate

Sub-tasks:	Supporting Knowledge and Abilities:
a) Negotiate change orders with client	<ul style="list-style-type: none"> • Recognize when “to give and when to take”
b) Recognize what your real bottom line is and what you have to give to get it	
c) Negotiate with suppliers	<ul style="list-style-type: none"> • Create a “win-win” situation, if possible
d) Negotiate with sub-contractors regarding change requests	
e) Negotiate with stakeholders	

Task E.15: Build strategic relationships

Sub-tasks:	Supporting Knowledge and Abilities:
a) Seek out other industry professionals	<ul style="list-style-type: none"> • e.g., to discuss topics of mutual interest
b) Establish formal or informal communication groups	

Area of Competence F: Manage Human Resources

Task F.1: Establish human resource needs

Sub-tasks:	Supporting Knowledge and Abilities:
a) Consult scope to determine on-site requirements	<ul style="list-style-type: none"> • e.g., on-site shipper, administrative assistant, safety officer, etc. • Consider complexity of job • Consider skills sets of staff
b) Schedule arrival and work times of required human resources	<ul style="list-style-type: none"> • Consider time-frames within project
c) Establish whether external support is required	<ul style="list-style-type: none"> • e.g., to complete project deliverables within specialized areas
d) Document activities of human resources throughout project	<ul style="list-style-type: none"> • Ensure documentation is forwarded to head-office

Task F.2: Recruit staff

Sub-tasks:	Supporting Knowledge and Abilities:
a) Clearly define the job to be filled	
b) Clearly define the requirements of the successful job incumbent	<ul style="list-style-type: none"> • For example: <ul style="list-style-type: none"> ○ Level of education ○ Relevant work experience
c) Clearly define the responsibilities of the successful job incumbent	
d) Clearly define the nature of the project and organization	<ul style="list-style-type: none"> • Geographical location is critical
e) Use networks to advertise job opportunities	<ul style="list-style-type: none"> • e.g., EDA, company website, commercial job search websites, tradeshows

Task F.3: Build teams

Sub-tasks:	Supporting Knowledge and Abilities:
a) Consider each individual's strengths	
b) Encourage collaboration among team members	
c) Consider attitudes of individuals	<ul style="list-style-type: none"> • e.g., willingness to work and collaborate with stakeholders, team members, etc.

Task F.4: Evaluate staff

Sub-tasks:	Supporting Knowledge and Abilities:
a) Set clearly defined and measurable performance standards	<ul style="list-style-type: none"> • Ensure standards are not unrealistically high
b) Evaluate staff members against set criteria	<ul style="list-style-type: none"> • Know when to have private conversations
c) Provide staff members with feedback	
d) Suggest ways to improve or enhance staff performance	

Task F.5: Comply with individual and group contracts

Sub-tasks:	Supporting Knowledge and Abilities:
a) Have a contract ready stating expectations, ancillaries to be supplied	<ul style="list-style-type: none"> • e.g., transportation, computers, communication devices, etc.
b) Conduct meeting with contracted individuals and groups to discuss requirements and regulations	<ul style="list-style-type: none"> • To ensure that all parties are aware of their responsibilities
c) Read and interpret union contracts	

Task F.6: Manage relationships

Sub-tasks:	Supporting Knowledge and Abilities:
a) Build contact network	
b) Maintain and enhance positive working relationships	
c) Recognize and promote exceptional performance	
d) Recognize developing conflicts	
e) Identify root cause of conflicts	
f) Utilize conflict resolution skills	<ul style="list-style-type: none"> • Avoid confrontation • Listen to all parties involved • Remain calm and rational • Identify interests, not positions
g) Respond and react appropriately	

Task F.7: Encourage continuous learning

Sub-tasks:	Supporting Knowledge and Abilities:
a) Provide project-related education (upgrade or trade training)	<ul style="list-style-type: none"> • e.g., from manufacturer's representatives
b) Identify strengths and weaknesses of employees	<ul style="list-style-type: none"> • Provide targeted training as required
c) Establish individual development plans	
d) Support on-site mentoring process, if possible	<ul style="list-style-type: none"> • Determined by ratio of experienced workers to new workers
e) Ensure certifications and licenses are updated, as required	<ul style="list-style-type: none"> • e.g., WHMIS, first aid, CPR, bucket rescue, forklift, high voltage cover-up

Task F.8: Discipline/dismiss staff

Sub-tasks:	Supporting Knowledge and Abilities:
a) Collaborate with others on discipline issues	<ul style="list-style-type: none"> • e.g., functional managers, human resources department
b) Identify legitimate grounds for discipline/dismissal	<ul style="list-style-type: none"> • Follow company and unionized policies and procedures, and Employment Standards Act
c) Communicate grounds for discipline/dismissal to staff member(s)	<ul style="list-style-type: none"> • Follow company and unionized policies and procedures, and Employment Standards Act
d) Provide adequate notice of dismissal	<ul style="list-style-type: none"> • Allow the staff member(s) sufficient time to begin searching for alternative employment

Area of Competence G: Develop Personal Competencies

Task G.1: Establish ethics and integrity

Sub-tasks:	Supporting Knowledge and Abilities:
a) Promote honesty	
b) Be accountable	
c) Provide quality service	<ul style="list-style-type: none"> • e.g., to customers
d) Support codes of ethics	<ul style="list-style-type: none"> • e.g., PMI code of conduct, associations
e) Be consistent in your actions	
f) Lead by example	
g) Compliment staff when warranted	

Task G.2: Display interpersonal skills

Sub-tasks:	Supporting Knowledge and Abilities:
a) Demonstrate communication skills	<ul style="list-style-type: none"> • Including: <ul style="list-style-type: none"> ○ Literacy ○ Verbal skills ○ Active listening
b) Demonstrate social skills	<ul style="list-style-type: none"> • Including: <ul style="list-style-type: none"> ○ Maintaining good eye contact ○ Using body language ○ Building rapport ○ Respecting cultural differences
c) Demonstrate emotional maturity	<ul style="list-style-type: none"> • Including: <ul style="list-style-type: none"> ○ Being self-aware ○ Displaying self-control

Task G.3: Ask insightful questions

Sub-tasks:	Supporting Knowledge and Abilities:
a) Gain involvement from entire staff	<ul style="list-style-type: none"> • Ask target questions to draw out staff members who do not normally speak up
b) Ask specific and detailed questions to gain appropriate answers	
c) Ensure questions are phrased in correct terminology	<ul style="list-style-type: none"> • Adapt question to aptitude of person being questioned
d) Validate responses by rephrasing	<ul style="list-style-type: none"> • Ensure comprehension
e) Ask questions in a positive manner	

Task G.4: Work safely

Sub-tasks:	Supporting Knowledge and Abilities:
a) Follow company policies and procedures and regulatory requirements	<ul style="list-style-type: none"> • e.g., possess knowledge of company and customer health and safety requirements • Use appropriate PPE
b) Recognize and correct any unsafe situations and actions	
c) Monitor and enforce safety program on-site	<ul style="list-style-type: none"> • Take corrective action as required
d) Instill positive safety behaviours among staff	<ul style="list-style-type: none"> • Lead by example

Task G.5: Judge personal performance

Sub-tasks:	Supporting Knowledge and Abilities:
a) Examine past actions	
b) Seek feedback from others	
c) Identify areas requiring improvement	
d) Develop a strategy to improve personal performance	
e) Implement strategy	
f) Evaluate the impact and success of the strategy	<ul style="list-style-type: none"> • For example: <ul style="list-style-type: none"> ○ Did performance improve?

Task G.6: Seek mentors

Sub-tasks:	Supporting Knowledge and Abilities:
a) Enhance strengths and identify areas that require improvement	
b) Set goals for achievement	<ul style="list-style-type: none"> • Outline goals in personal development plan • Build on strengths, improve weaknesses
c) Ensure mentor complements personal style and needs	
d) Select committed and interested individuals to act as mentors	

Task G.7: Establish a good work/life balance

Sub-tasks:	Supporting Knowledge and Abilities:
a) Set personal boundaries	
b) Schedule work duties and time off effectively	
c) Make time for family and recreational activity	
d) Maintain mental, physical, social, emotional and spiritual health	
e) Respect your limitations	

Task G.8: Develop and maintain skills

Sub-tasks:	Supporting Knowledge and Abilities:
a) Recognize skill areas requiring development or improvement	
b) Take part in continuous learning and skill development programs	
c) Keep up-to-date with industry trends and relevant technological advancements	<ul style="list-style-type: none"> • e.g., attend tradeshow, relay new information and methodologies to staff
d) Take initiative to better the industry	<ul style="list-style-type: none"> • e.g., develop best practices

Task G.9: Establish record of success

Sub-tasks:	Supporting Knowledge and Abilities:
a) Demonstrate successful delivery of projects	
b) Establish references	
c) Maintain professional record of activity	
d) Document PDU's	

