



Canadian Construction
Association
Gold Seal Certification

Owner's construction manager occupational profile



RELATED MANAGEMENT SKILLS

Competency	Supporting competency/skill/knowledge/task
Communicate clearly and ethically	Produce written correspondence and reports
	Make oral presentations
	Conduct activities in a professional and ethical manner
	Maintain good relations with stakeholders
	Competently use computer software packages
	Respect and comply with the owner's policies and procedures
	Understand levels of authority
	Respect client confidentiality
	Establish and maintain project communication protocol
	Develop and/or implement a communications or public relations plan
Understand and apply dispute resolution mechanisms	Understand local labour agreements of construction trades and suppliers
	Know role of provincial labour relations board
	Understand employment standards
	Understand how to negotiate contracts ethically
	Identify and equitably resolve potential conflicts involving stakeholders
	Understand arbitration and mediation processes
	Understand purpose and impacts of litigation
	Understand dispute resolution process according to CCDC 40
Conduct productive meetings	Establish a meeting agenda
	Recognize the purpose and intent of the meeting
	Know how to take accurate minutes
	Schedule and conduct meetings
	Allow all parties involved to discuss all relevant issues
	Introduce all project stakeholders
	Distribute meeting minutes in time frame as agreed upon
	Understand legal documents implications of meeting minutes
Recommend the employing or termination of project team members	Understand legal responsibilities of the employer and the employee
	Know interrelationships between the various parties involved in a construction project
	Assess technical qualifications, education, work attitudes, and suitability of applicants
	Review performance of the team
	Understand employee rights
Manage owner's project team	Lead project team
	Recommend team members
	Motivate team and maintain morale
	Identify strengths and weaknesses of team members

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Competency	Supporting competency/skill/knowledge/task
	Recommend professional development for team members
	Establish roles and responsibilities matrix
Establish process for controlling internal documents	Understand transmittal documents
	Understand filing practices
	Understand management and control of documents and communication processes
	Understand implications of improperly kept documents and records
	Manage project documents
Keep current with trends in the industry	Understand current estimating practices
	Understand and keep current on economic and business environment
	Keep current with all applicable legislation, regulation and codes
	Understand building information models (BIM), computer-based schedule programs, web-based file management and information systems and other engineering and construction technology tools

PROJECT PLANNING

Competency	Supporting competency/skill/knowledge/task
Prepare a business case	Understand statement of requirements
	Understand project risks and prepare and recommend and manage mitigation
	Understand tender documents
	Prepare options in response to the statement of requirements
	Understand and model the project charter
	Analyze owner needs and functional operations
	Analyze capital, life cycle, operations and maintenance impact of scope options
	Assess contract delivery options best suited for the project
	Present multiyear analysis to produce the best long-term case
	Prepare business case
Prepare project plan	Develop statement of requirements
	Establish defined scope of work
	Select delivery method
	Define tendering process
	Evaluate tender
	Obtain approval for scope, budget and schedule
	Prepare work breakdown structure, sequence of activities, project schedule, project cost and resources schedule
Prepare a project budget	Complete financial forecast for project
	Understand components of a budget
	Prepare construction estimate
	Understand importance of budgeting
	Identify soft costs that impact the project
	Assess cash flow requirements
	Assess multiyear budget
	Prepare project budget and construction estimate
	Understand all municipal by-laws and requirements that could impact budget
Develop a project schedule	Understand critical path process
	Understand resource levelling throughout project
	Identify key milestones
	Schedule financing, design, construction and turn over activities
	Know project deliverables
	Understand project sequencing
	Understand project methodology

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Competency	Supporting competency/skill/knowledge/task
Implement a budget control system	Know budget and schedule constraints
	Analyze contract size and complexity, critical construction operations and contractual requirements for reporting costs/progress
	Identify cost overruns and take corrective action to mitigate
	Maintain accurate estimate for project duration
	Determine reasons for budget variance
	Analyze costs of risks and update regularly throughout project
	Identify cash allowances and contingencies and manage throughout duration of project
	Perform cash flow analysis, review with owner and manage throughout duration of project
Develop financial management plan with owners' finance team	Understand cost code formatting of a budget
	Know importance of appropriate level of detail within a budget
	Develop and manage payment schedules
	Know discretionary and mandatory provincial holdback provisions within the contract
	Understand owner's accounting procedures
	Review progress invoicing, invoicing from owner suppliers and advise owner of payment
Manage selection process for consultants	Develop scope of work for consultants
	Negotiate scope of work and cost with consultant
	Understand methods for selecting consultants
	Evaluate proposals based on scope of work and cost for the owner and make recommendations to owner
	Develop the selection criteria
	Develop consultant agreements and execute with owner
	Understand errors and omissions insurance requirements
Manage design process	Monitor and control design progress
	Coordinate consultant with the user group
	Monitor and control the design schedule
	Conduct regular review of consultant design to confirm to owner intentions and adherence to the program
	Implement value analysis
	Understand the duties of the prime consultant
Prepare construction documents	Know hierarchy in contract documents
	Ensure tender documents are drafted fairly and equitably
	Know drawings and specifications at all phases of the design and construction process
	Know environmental impacts and owners' and contractors' obligations to local and provincial authorities

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Competency	Supporting competency/skill/knowledge/task
	Ensure tender documents include the owners project specific requirements
	Ensure integration of owner supplied equipment and services with the project construction schedule
	Identify submittal requirements
	Assess impact on budget and schedule resulting from consultant errors or omissions
	Mitigate risks associated with potential liabilities
	Ensure owners' interests are protected against potential legal liability
	Ensure bid documents equitably address risk management and risk transfer
	Know contract law with respect to the owner, consultants and contractor
	Detect discrepancies, ambiguities, omissions in contract documents
Establish commissioning requirements	Know commissioning requirements and procedures
	Ensure scopes of work for the commissioning process and procedures are defined
	Ensure commissioning requirements are captured in the tender documents
Manage selection process for contractor	Develop scope of work for contractor
	Manage tender process including addenda responses and site visits
	Understand tender and request for proposal processes
	Assess contractor suitability
	Evaluate tenders based on compliance with bid documents
	Know tendering laws in Canada
Perform engineering and design studies	Know requirements for or perform the tasks of an engineering or design study
	Manage land development study
	Develop a land use analysis
	Analyze development studies and land use studies and report to owner
Ensure all owner and contractor insurance and contract securities are in place	Understand contract requirements for insurances
	Ensure contractor has required project insurance
	Understand labour and material bonds
	Understand performance bonds
	Understand the conditions under which to "call a bond"
	Understand forms of contract securities
	Assess client's risk exposure

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Competency	Supporting competency/skill/knowledge/task
Provide advice and consultation on project design	Understand common construction design and methodology
	Know and compare commonly used products and materials
	Direct and facilitate expertise of consultants throughout the analysis
	Understand value engineering
	Develop scope of work for consultants and contractors
Manage selection process for owner supplied services and equipment	Develop owner's supplied services and/or equipment list
	Develop scope of work, for owners' supplied services and/or equipment
	Tender owner's supplied services and/or equipment
	Select and negotiate with successful bidder
	Negotiate long-term owner maintenance contracts
	Organize and schedule delivery of owner's supplied services and/or equipment
	Coordinate services with consultant and contractor
	Manage delivery and placement of owner's supplied services and/or equipment
	Issue and confirm purchase orders for owner's supplied services and/or equipment
	Understand applicable taxes, customs duties, brokerage fees and typical discounts
	Understand onsite and offsite handling technique
	Understand current methods of procurement
Organize and chair owner's preconstruction meeting	Organize and schedule owner's preconstruction meeting
	Know who is to attend
	Create and distribute the meeting agenda
	Know the items to be included on the owner's preconstruction meeting agenda
	Introduce and review the project charter
	Chair the meeting
	Distribute the minutes
Review project testing and inspection requirements	Know testing and testing requirements to be included in the contract documents
	Identify systems that require specific testing and inspection
	Understand procedures for inspections/testing
	Know regulatory required testing and inspection
	Know how and when to engage the use of a third-party testing agencies

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Competency	Supporting competency/skill/knowledge/task
Manage site-specific planning and approvals	Understand municipal site plan approval process
	Engage municipal authority to create support for the project
	Identify studies and reports that are required for site plan approval
	Identify provincial permits or other approvals that will be required
	Understand owner's rights throughout the site plan approval process
	Represent owners' interests throughout the site plan approval process
	Understand impact of changes required by the site plan approval process on cost and schedule
Understand municipal planning bylaws and zoning	Understand municipal planning bylaws and zoning
	Coordinate work with urban/land planning consultants
	Understand potential environmental impacts on the community
	Understand jurisdiction of provincial authorities
Maintain good relationships with public and municipal authorities	Maintain good relationships with local municipal authorities
	Maintain good relationships with local community
	Organize and facilitate town hall meetings
	Understand and accommodate local needs and requirements
	Maintain good relationships with local municipal councilors
Understand legal considerations impacting project	Coordinate with legal counsel in the preparation of leasing, land purchasing and selling documentation
	Understand contract law and legal implications of the scope of work for entire project
	Understand legal requirements and implications of buying and selling land/property including deeds and real estate transactions
	Understand legal and cost implications of leasing properties prior to site plan approval
Assemble and manage owner's project team	Understand roles and responsibilities required for the owner's project team
	Develop and maintain reporting structure for the owner's project team
	Directly hire, or participate, in hiring of owner's project team
	Manage owner's project team for duration of project

CONTRACT ADMINISTRATION

Competency	Supporting competency/skill/knowledge/task
Manage service and equipment contracts	Know statutory regulations governing "constructor"
	Know statutory regulations governing "owner"
	Receive, review and process shop drawings for owner supplied services and equipment
	Manage delivery schedules
	Ensure required permits are in place for owner supplied services and equipment
Ensure project permits are in place	Understand federal and provincial regulations and municipal bylaws impacting construction
	Identify permit requirements
	Understand permit application and review process
	Ensure required permits are obtained
	Understand owner's commitments
	Review permit status with consultants and contractor prior to and during construction
Ensure a quality control process is implemented	Understand damage claims
	Understand quality control procedures
	Ensure inspection of custom-made materials at place of manufacture, and materials when delivered on site
	Ensure contractor has a quality control process in place
	Observe quality of construction installations
	Review contractor and consultant quality review reports
	Ensure that all nonconforming works is rectified and accepted by the consultants
Ensure a safety program and a site-specific safety plan is in place	Understand health and safety legislation and obligations
	Understand owner's safety policy
	Know the contractual safety requirements
	Ensure safety responsibilities are assigned
	Develop a safety monitoring policy for the project
	Understand good safety practices
	Know the accident investigation and reporting procedures
	Understand liability issues
	Receive and review contractor safety reports
	Receive and review all provincial authority's safety reports
	Ensure that all safety infractions have been rectified
	Know owners' rights when contractor continuously violates provincial safety regulations
	Develop and/or know the owners' publicity policy for critical accidents on site

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Competency	Supporting competency/skill/knowledge/task
Ensure required testing and inspection is conducted	Know testing requirements included in contract documents
	Understand procedures for inspections/testing
	Receive, review and monitor testing and inspection reports
	Ensure rectification of failed systems
	Create scope of work, issue request for quotations, review quotations and issue purchase order for 3rd party testing companies
Manage construction claims process	Know contractual responsibilities of all project parties
	Maintain written records (including photographs of all potential claim situations)
	Analyze impact on the schedule and costs
	Mitigate potential claims
	Identify potential claims
	Understand claim process and role of all stakeholders
	Ensure all claims are resolved
	Identify when to involve legal counsel
	Maintain accurate and continuous record keeping
	Represent owner in all claim situations
	Understand claims resolution procedures for outlined in the contract
Manage contract documents	Review and identify work that is not specified in contract documents
	Manage project queries log request for information system
	Manage contract change management system
	Propose changes as required
	Report potential changes and including impacts to owner
	Assess validity of potential change to contract
	Document reasons for all changes
	Understand purpose of a supplemental instruction
	Understand purpose of a contemplated change
	Understand purpose of a change order
	Understand purpose of a change directive
Manage project invoicing	Understand invoice approval and payment process
	Implement the contract terms and conditions for payment
	Review completed work and deliveries and compare to invoice
	Maintain purchasing records
	Review and recommend payment of invoices to owner
	Maintain financial records including changes to contracts

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Competency	Supporting competency/skill/knowledge/task
Manage submittal process	Know the procedures for expediting, preparation, delivery and approval of submittals
	Understand purpose of submittals
	Understand how submittals are tied to construction schedule
	Understand role of consultant in the review of submittals
	Understand responsibilities of the contractor in reviewing and providing submittals
	Understand importance of a submittal schedule
	Consult with and advise consultant regarding the materials and assemblies will require submittals
	Understand value of shop drawings and mock-ups
Manage liens process	Understand provincial lien legislation
	Ensure contractor responsibility to "bond off" the lien are contained in the contract
	Understand owner's obligation to pay progress payments in a lien situation
	Understand owner's obligation to retain mandatory holdback
	Search property title for liens before payment is released
	Understand impact of liens on receiving funds from lenders
Monitor sustainability initiatives	Understand project sustainability strategy
	Maintain required documentation
	Review, track and report on sustainability requirements
Manage progress of work throughout project	Understand contract documents and required deliverables
	Ensure contract documents are administered fairly and equitably
	Know contractual relationships between the parties
	Encourage, support and model maintain cooperative positive working relationships
	Ensure submittal of required documentation
	Ensure consultant field review reports are completed
	Maintain records of construction progress
	Determine items to be included in the owner schedule updates
	Monitor quality of work
	Understand methods for measuring construction in place
	Monitor construction schedule to determine if there are slippages
	Report construction progress and project financials to owner
	Ensure consultants are meeting contractual obligations
	Develop mitigation/recovery strategy

PROJECT CLOSEOUT

Competency	Supporting competency/skill/knowledge/task
Manage closeout and turnover of the work alongside the consultants and contractor	Ensure all contract deliverables have been completed
	Ensure all project documentation has been received and reviewed
	Attend turn over meeting with contractor and consultants
	Participate in transfer procedures required for commissioning
	Understand impact of partial completion
Manage deficiency resolution process	Manage and participate in deficiency inspections with consultants
	Know current electronic formats for managing deficiency review and approval
	Ensure contractor has provided deficiency list prior to owner/consultant inspections
	Review all work completed under contract
	Review list of deficient and incomplete work and confirm cost to complete the work
	Retain sufficient funds from progress payments to ensure completion of outstanding or deficient work
	Understand use and constraints of mandatory legislated holdback
	Understand contractual process for owner to complete or rectify the work if the contractor fails to do so
Support consultant, contractor and authorities having jurisdiction through the occupancy process	Understand acceptable parameters for reviewing deficiencies
	Provide all owner information required for occupancy
	Ensure consultants provide required letters for municipal authorities
	Ensure authorities having jurisdiction have deemed the project acceptable for occupancy
	Ensure utility companies have been notified of building ownership
Support consultant and contractor through the substantial performance process	Ensure insurance company has been notified
	Understand difference between qualitative and quantitative observations
	Know provincially legislated terms and conditions for achieving substantial performance
	Assist consultant in determining if substantial performance has been achieved
	Know all required contractual deliverables for substantial performance
	Ensure appropriate provincially required certification of substantial performance has been issued to the contractor
	Know significance of the issuance date of substantial performance or the date that the certificate of substantial performance is published
	Obtain payments certificate and conformity letter
	Coordinate and organize training of facility maintenance staff with contractor
	Observe, track, report, advise and coordinate the closeout and turnover of the work alongside the consultants and contractor

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Competency	Supporting competency/skill/knowledge/task
Review, reconcile and release all final payments	Review holdback invoices and release holdback monies
	Know contract requirements for release of final payments
	Reconcile all financial accounts
	Understand deficiency holdback procedure with respect to work outstanding
	Understand statutory lien holdback procedures and obligations
	Understand who and why searches on the property title for liens are required before payment is released
	Ensure letter of completion is prepared and issued
	Ensure all outstanding claims are resolved
	Manage and resolve liens that are placed on the property
Ensure that the contractor warranty program is in place	Ensure building staff are following the warranty program when issues arise
	Know warranty responsibility of stakeholders