



## OWNER'S PROJECT MANAGER EXAMINATION SPECIFICATION

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This examination will be developed based on the following format:

<u>SECTION I</u>	<u>VALUE</u>
(1) Multiple Choice Items	
(A) 20 Items – Related Management Skills	15%
(B) 40 Items – Project Planning	35%
(C) 30 Items – Contract Administration	25%
(D) 10 Items – Project Closeout	5%
 <u>SECTION II</u>	
(1) Communication	5%
(2) Short Answer	15%
 TOTAL VALUE	 100%

**SECTION: RELATED MANAGEMENT SKILLS**

<b>TASK NO. &amp; VALUE</b>	<b>TASK DESCRIPTION</b>	<b>TASK SUPPORTING KNOWLEDGE AND ABILITIES</b>
7 items	Communicate clearly with stakeholders and public. (30)	<ul style="list-style-type: none"> <li>a) Ability to produce written correspondence and reports.</li> <li>b) Ability to make oral presentations.</li> <li>c) Ability to communicate by phone, Internet, etc.</li> <li>d) Ability to maintain good relations with stakeholders.</li> <li>e) Ability to use computer software packages.</li> <li>f) Ability to respect the owner's policies and procedures and understand the level of authority.</li> <li>g) Ability to establish and maintain project communication protocol.</li> <li>h) Ability to implement a public relations plan.</li> </ul>
6 items	Identify and resolve potential conflicts involving staff, stakeholders, consultants, general contractors, and sub-contractors. (130)	<ul style="list-style-type: none"> <li>a) Knowledge of local labour agreements of construction trades and suppliers.</li> <li>b) Knowledge of the role of provincial labour relations board.</li> <li>c) Knowledge of mediation and arbitration procedures.</li> <li>d) Knowledge of employment standards.</li> <li>e) Knowledge of contract negotiations.</li> </ul>
1 item	Conduct meetings. (56)	<ul style="list-style-type: none"> <li>a) Knowledge of minute taking.</li> <li>b) Ability to conduct a meeting.</li> <li>c) Ability to schedule a meeting.</li> <li>d) Ability to allow all parties to discuss all issues.</li> <li>e) Ability to introduce all players of the construction project.</li> <li>f) Ability to distribute minutes and/or meeting information in a timely manner.</li> </ul>
Do Not Test	Recommend the hiring or dismissal of staff and consultants. (34)	<ul style="list-style-type: none"> <li>a) Knowledge of legal responsibilities of employer to employee.</li> <li>b) Knowledge of the inter-relationships between the various parties involved in a construction project.</li> <li>c) Ability to assess technical qualifications, education, work attitudes, and personality of applicants.</li> <li>d) Ability to review performance of staff.</li> </ul>
5 items	Direct project staff. (32)	<ul style="list-style-type: none"> <li>a) Ability to organize staff.</li> <li>b) Ability to co-ordinate staff.</li> <li>c) Ability to manage staff.</li> <li>d) Ability to motivate staff.</li> <li>e) Ability to maintain team morale.</li> <li>f) Ability to lead staff.</li> <li>g) Ability to recommend training and career progression.</li> </ul>

<b>TASK NO. &amp; VALUE</b>	<b>TASK DESCRIPTION</b>	<b>TASK SUPPORTING KNOWLEDGE AND ABILITIES</b>
1 item	Establish a method for controlling documents. (69)	<ul style="list-style-type: none"> <li>a) Knowledge of spreadsheets and/or databases.</li> <li>b) Knowledge of transmittal documents.</li> <li>c) Knowledge of filing practices.</li> <li>d) Knowledge of document control.</li> <li>e) Knowledge of the legal implications of improperly kept records.</li> </ul>
Do Not Test	Keep abreast with technological changes in the industry. (46)	<ul style="list-style-type: none"> <li>a) Knowledge of current estimating practices.</li> <li>b) Knowledge of economics micro/macro.</li> <li>c) Ability to keep current with codes and regulations.</li> <li>d) Ability to maintain current data books.</li> <li>e) Ability to keep current with new construction technology and materials.</li> </ul>

## **SECTION: PROJECT PLANNING**

<b>TASK NO. &amp; VALUE</b>	<b>TASK DESCRIPTION</b>	<b>TASK SUPPORTING KNOWLEDGE AND ABILITIES</b>
2 items	Prepare a statement of requirements. (131)	<ul style="list-style-type: none"> <li>a) Knowledge of project terminology.</li> <li>b) Knowledge of project life cycle.</li> <li>c) Ability to communicate with clients.</li> <li>d) Ability to understand the life cycle of the project.</li> <li>e) Ability to establish statement of work.</li> </ul>
4 items	Prepare project charter. (132)	<ul style="list-style-type: none"> <li>a) Ability to interpret user requirements in concept.</li> <li>b) Ability to prepare order of magnitude, cost estimate and schedule.</li> <li>c) Ability to define project phases into initiation, definition, design, implementation, and closeout.</li> </ul>
4 items	Prepare a business case. (133)	<ul style="list-style-type: none"> <li>a) Ability to analysis client needs and functional operations.</li> <li>b) Ability to analyze capital, life cycle, operations and maintenance impact of scope options.</li> <li>c) Ability to assess contract delivery options for each scope option.</li> <li>d) Ability to present multiyear analysis to produce the best long term case considering all criteria that impact costs.</li> </ul>

TASK NO. & VALUE	TASK DESCRIPTION	TASK SUPPORTING KNOWLEDGE AND ABILITIES
4 items	Prepare project plan. (134)	<ul style="list-style-type: none"> <li>a) Ability to develop statement of requirements.</li> <li>b) Ability to select delivery method such as design bid build, design build, construction management.</li> <li>c) Ability to define the tendering process</li> <li>d) Ability to evaluate tender for price, quality, etc.</li> <li>e) Ability to obtain approval for scope, budget, and schedule.</li> </ul>
3 items	Prepare project budget. (38)	<ul style="list-style-type: none"> <li>a) Knowledge of financial forecasting.</li> <li>b) Knowledge of budget components.</li> <li>c) Knowledge of the importance of having a sound budget and realizing the impact of the owner's investment.</li> <li>d) Knowledge of financial software.</li> <li>e) Knowledge of all soft costs that impact the project.</li> <li>f) Ability of assessing the need of cash flow requirements.</li> <li>a) Ability to forecast multi-year budget.</li> </ul>
2 items	Develop a project schedule. (135)	<ul style="list-style-type: none"> <li>a) Knowledge of diagrammatic methods of scheduling.</li> <li>b) Knowledge of resource levelling throughout project.</li> <li>c) Ability to determine cash flow through life of project.</li> <li>d) Ability to use scheduling software.</li> <li>e) Ability to establish milestones.</li> </ul>
1 item	Implement a budget control system. (136)	<ul style="list-style-type: none"> <li>a) Knowledge of budget and schedule constraints.</li> <li>b) Ability to analyse contract size and complexity, critical construction operations and contractual requirements for reporting costs/progress.</li> <li>c) Ability to identify cost overruns and take corrective action.</li> <li>d) Ability to maintain accurate estimate to complete project.</li> <li>e) Ability to determine reasons for variance.</li> <li>f) Ability to analyse risks against costs.</li> </ul>

<b>TASK NO. &amp; VALUE</b>	<b>TASK DESCRIPTION</b>	<b>TASK SUPPORTING KNOWLEDGE AND ABILITIES</b>
1 item	Develop cost coding system with finance. (31)	<ul style="list-style-type: none"> <li>b) Knowledge of typical cost code subdivisions of a budget.</li> <li>c) Knowledge of importance of appropriate level of detail within a budget.</li> <li>d) Knowledge of payment schedule.</li> <li>e) Knowledge of contractual and legal holdback provisions.</li> <li>f) Knowledge of owner's accounting procedures.</li> <li>g) Knowledge of the importance of progress billing.</li> </ul>
2 items	Select consultants. (137)	<ul style="list-style-type: none"> <li>a) Knowledge of selection methods.</li> <li>b) Ability to analyse proposals.</li> <li>c) Ability to develop selection criteria.</li> </ul>
Do Not Test	Maintain design control. (138)	<ul style="list-style-type: none"> <li>a) Ability to monitor design progress.</li> <li>b) Ability to co-ordinate consultant with the user group.</li> <li>c) Ability to monitor schedule.</li> <li>d) Ability to conduct periodic review of iterative design to confirm to user requirements.</li> <li>e) Ability to implement value analysis.</li> </ul>
3 items	Ensure construction documents are prepared in accordance with owner's requirements. (52)	<ul style="list-style-type: none"> <li>a) Knowledge of contract document hierarchy.</li> <li>b) Ability to study drawings and specifications early in the design phase.</li> <li>c) Ability to be aware of any environmental impact on the contract.</li> <li>d) Ability to assess impact on contract resulting from errors or omissions.</li> <li>e) Ability to ensure the owner's interests are protected against potential legal liability.</li> </ul>
3 items	Review contract documents. (60)	<ul style="list-style-type: none"> <li>a) Knowledge of construction contract documentation (forms of contracts, drawings, specs, etc.).</li> <li>b) Knowledge of contract law between owners, consultants, and contractors.</li> <li>c) Knowledge of different types of construction contracts.</li> <li>d) Ability to detect discrepancies, ambiguities, omissions, in contract documents.</li> </ul>

<b>TASK NO. &amp; VALUE</b>	<b>TASK DESCRIPTION</b>	<b>TASK SUPPORTING KNOWLEDGE AND ABILITIES</b>
Do Not Test	Apply value analysis process to design phase. (48)	<ul style="list-style-type: none"> <li>a) Knowledge of design methods of constructions.</li> <li>b) Knowledge of various methods of construction.</li> <li>c) Knowledge of various products and materials.</li> <li>d) Ability to compare various construction methods and materials.</li> <li>e) Ability to direct and facilitate expertise of consultants throughout the analysis.</li> </ul>
1 item	Ensure a commissioning plan is in place. (139)	<ul style="list-style-type: none"> <li>a) Knowledge of commissioning procedures.</li> <li>b) Ability to define commissioning scope.</li> </ul>

**SECTION: CONTRACT ADMINISTRATION**

<b>TASK NO. &amp; VALUE</b>	<b>TASK DESCRIPTION</b>	<b>TASK SUPPORTING KNOWLEDGE AND ABILITIES</b>
Do Not Test	Approve construction implementation plan. (62)	<ul style="list-style-type: none"> <li>a) Knowledge of project schedule.</li> <li>b) Knowledge of project deliverables.</li> <li>c) Knowledge of project sequencing.</li> <li>d) Knowledge of project methodology.</li> <li>e) Ability to approve project schedule.</li> <li>f) Ability to approve project deliverables.</li> <li>g) Ability to approve project sequencing.</li> <li>h) Ability to approve project methodology.</li> <li>i) Ability to ensure the integration of owner supplied goods and services with contractor's construction schedule.</li> </ul>
3 items	Select contractors. (43)	<ul style="list-style-type: none"> <li>a) Knowledge of pre-qualification process and other selection methods.</li> <li>b) Ability to assess the reliability of service.</li> <li>c) Ability to evaluate the cost in comparison to reliability.</li> </ul>
6 items	Negotiate, modify, and award construction contracts. (61)	<ul style="list-style-type: none"> <li>a) Knowledge of negotiating considerations.</li> <li>b) Knowledge of scope of work.</li> <li>c) Knowledge of contract requirements.</li> <li>d) Knowledge of considerations in negotiating terms of payment and delivery.</li> <li>e) Knowledge of on-site and off-site handling techniques.</li> <li>f) Knowledge of sales tax, customs duties, brokerage fees, typical discounts, etc.</li> <li>g) Knowledge of insurance coverage.</li> <li>h) Knowledge of contracts for subcontractors.</li> <li>i) Ability to assess reliability, quality, etc. of subcontractors.</li> <li>j) Ability to issue and confirm purchase orders for materials, equipment and miscellaneous supplies.</li> <li>k) Ability to evaluate quotations for conformity with contract documents.</li> <li>l) Ability to provide contractors with clear written instructions.</li> <li>m) Ability to assess reliability, quality, and financial capability of contractors.</li> <li>n) Ability to procure equipment for project.</li> <li>o) Ability to procure materials for project.</li> <li>p) Ability to recognize the impact on the schedule and costs</li> <li>q) Ability to understand your costs.</li> </ul>

<b>TASK NO. &amp; VALUE</b>	<b>TASK DESCRIPTION</b>	<b>TASK SUPPORTING KNOWLEDGE AND ABILITIES</b>
1 item * (see note 1 at section end)	Ensure all owner and contractor insurance and bonding is in place. (57)	<ul style="list-style-type: none"> <li>a) Knowledge of performance bonds, labour and material bonds and other forms of available insurance.</li> <li>b) Knowledge of typical contract requirements for insurance and bonding.</li> <li>c) Ability to assess risk exposure.</li> </ul>
5 items	Co-ordinate additional contracts/suppliers outside of base contract. (140)	<ul style="list-style-type: none"> <li>a) Knowledge of Ministry of Labour regulations affecting who is designated as "constructor"</li> <li>b) Ability to co-ordinate shop drawings</li> <li>c) Ability to co-ordinate multiple overlapping schedules</li> </ul>
2 items	Arrange for permits. (66)	<ul style="list-style-type: none"> <li>a) Knowledge of types of permits and information required by regulatory agencies.</li> <li>b) Knowledge of federal, provincial and municipal laws affecting construction.</li> </ul>
Do Not Test	Ensure a quality control process is implemented. (39)	<ul style="list-style-type: none"> <li>a) Knowledge of damage claims.</li> <li>b) Knowledge of re-ordering procedures.</li> <li>c) Knowledge of construction standards established in code, contract documents and owner's policy.</li> <li>d) Knowledge of periodic construction quality reports.</li> <li>e) Knowledge of typical quality control procedures.</li> <li>f) Ability to ensure inspection of custom-made materials at place of manufacture, and materials when delivered on site.</li> </ul>
1 item * (see note 1 at section end)	Approve project safety program. (33)	<ul style="list-style-type: none"> <li>a) Knowledge of health and safety legislation.</li> <li>b) Knowledge of owner's safety policy.</li> <li>c) Knowledge of contractual safety requirements.</li> <li>d) Ability to ensure safety responsibilities are assigned.</li> <li>e) Ability to develop a safety monitoring policy for the project.</li> </ul>
Do Not Test	Monitor construction safety program. (87)	<ul style="list-style-type: none"> <li>a) Knowledge of all safety legislation.</li> <li>b) Knowledge of good safety practices.</li> <li>c) Knowledge of accident investigation and reporting procedures.</li> </ul>
Do Not Test	Ensure public safety. (90)	<ul style="list-style-type: none"> <li>a) Knowledge of liability issues.</li> <li>b) Knowledge of signage.</li> <li>c) Ability to co-ordinate with local authorities.</li> </ul>
1 item	Arrange for required inspection/testing. (67)	<ul style="list-style-type: none"> <li>a) Knowledge of testing requirements included in contract documents.</li> <li>b) Knowledge of procedures for inspections/testing.</li> <li>c) Knowledge of private testing agencies.</li> </ul>

<b>TASK NO. &amp; VALUE</b>	<b>TASK DESCRIPTION</b>	<b>TASK SUPPORTING KNOWLEDGE AND ABILITIES</b>
4 items	Oversee work of consultants and contractors. (73)	<ul style="list-style-type: none"> <li>a) Knowledge of contract documents.</li> <li>b) Knowledge of liability issues associated with project consulting requirements.</li> <li>c) Knowledge of contractual relationships between the parties.</li> <li>d) Ability to maintain co-operative relations.</li> <li>e) Ability to ensure submittal of required documentation.</li> <li>f) Ability to monitor work.</li> <li>g) Ability to recognize the items requiring consulting.</li> </ul>
Do Not Test	Review construction progress. (85)	<ul style="list-style-type: none"> <li>a) Knowledge of record keeping of construction progress.</li> <li>b) Knowledge of methods for measuring construction in place.</li> <li>c) Ability to report progress.</li> </ul>
Do Not Test	Manage a quality control program. (84)	<ul style="list-style-type: none"> <li>a) Knowledge of construction standards established in code, contract documents and company policy.</li> <li>b) Knowledge of typical quality control procedures.</li> <li>c) Ability to ensure inspection of deliverables.</li> <li>d) Ability to produce periodic construction quality reports.</li> </ul>
4 items	Identify potential claims and take timely action. (49)	<ul style="list-style-type: none"> <li>a) Knowledge of contractual responsibilities of all concerned parties.</li> <li>b) Ability to maintain written (and photographic) records of all potential claim situations.</li> <li>c) Ability to ensure that all concerned parties are informed.</li> <li>d) Ability to analyse the impact on the schedule and associated costs.</li> </ul>
3 items	Approve changes to contract. (82)	<ul style="list-style-type: none"> <li>a) Ability to identify work that is not specified in contract documents.</li> <li>b) Ability to consult with consultant and contractor on cost and schedule.</li> <li>c) Ability to keep accurate contract change log.</li> <li>d) Ability to keep owner informed.</li> <li>e) Ability to assess validity of change to contract.</li> </ul>
1 item	Approve progress billings submitted by consultants/contractors. (77)	<ul style="list-style-type: none"> <li>a) Knowledge of basic accounting procedures.</li> <li>b) Knowledge of contract conditions for payment.</li> <li>c) Ability to be aware of all work completed.</li> <li>d) Ability to maintain expediting/purchasing records.</li> <li>e) Ability to ensure that invoiced materials have been delivered to site and invoiced work has been done.</li> </ul>

<b>TASK NO. &amp; VALUE</b>	<b>TASK DESCRIPTION</b>	<b>TASK SUPPORTING KNOWLEDGE AND ABILITIES</b>
		f) Ability to authorize invoices.
2 items	Ensure shop drawings are reviewed. (80)	a) Knowledge of procedures for expedition preparation, delivery and approval of shop drawings. b) Ability to recognize the need for shop drawings. c) Ability to understand shop drawings are tied to construction schedule.
5 items	Respond to construction claims. (76)	a) Knowledge of the obligation to represent the owner in a claim situation. b) Ability to properly document contract claims. c) Ability to identify potential contract claim situations. d) Ability to understand the claims resolution procedures for the contract. e) Ability to provide support documentation.
3 items	Respond to liens by contractors. (75)	a) Knowledge of provincial lien legislation. b) Knowledge of legal recourse. c) Ability to mediate.

**NOTE: (1) Test only one of these tasks on a test at a time**

## **SECTION: PROJECT CLOSEOUT**

<b>TASK NO. &amp; VALUE</b>	<b>TASK DESCRIPTION</b>	<b>TASK SUPPORTING KNOWLEDGE AND ABILITIES</b>
2 items	Execute commissioning/closeout plan. (141)	a) Knowledge of the project documents required (guarantees, as-built, warranties, quality control). b) Knowledge of transfer procedures required (commissioning, instruction for equipment use, labelling, etc.). c) Knowledge of impact of partial completion (liabilities, warranties, holdback). d) Ability to receive finalization documents (guarantees, as-built, warranties, etc.) e) Ability to ensure accounting has been supplied with all necessary cost information to finalize contract value. f) Ability to ensure owner's employees are trained.

<b>TASK NO. &amp; VALUE</b>	<b>TASK DESCRIPTION</b>	<b>TASK SUPPORTING KNOWLEDGE AND ABILITIES</b>
2 items	Ensure deficiency lists are created and resolved. (88)	<ul style="list-style-type: none"> <li>a) Knowledge of applicable standards for conducting inspections.</li> <li>b) Knowledge of methods and procedures for constructing the work.</li> <li>c) Knowledge of the relationship between deficiencies and acceptance.</li> <li>d) Ability to inspect all work done under contract.</li> </ul>
1 item	Approve substantial completion process. (79)	<ul style="list-style-type: none"> <li>a) Ability to assess completion request.</li> <li>b) Ability to release substantial completion approval.</li> <li>c) Ability to advertise substantial completion.</li> </ul>
1 item	Release all final payments. (98)	<ul style="list-style-type: none"> <li>a) Knowledge of final inspection procedures.</li> <li>b) Knowledge of contract requirements.</li> <li>c) Knowledge of legal documents required to obtain final payment (WCB, stat/dec., etc.).</li> <li>d) Ability to ensure letter of completion through final inspection is prepared.</li> <li>e) Ability to ensure all outstanding claims are resolved.</li> </ul>
2 item	Hand over project to facility's management. (142)	<ul style="list-style-type: none"> <li>a) Ability to identify outstanding deficiencies.</li> <li>b) Ability to transfer proper documentation such as as-buids, warranties, building manuals, etc.</li> </ul>
1 item	Initiate a warranty claim. (92)	<ul style="list-style-type: none"> <li>a) Knowledge of contractor's responsibility under warranties.</li> <li>b) Ability to provide proper documentation in the preparation of claims.</li> <li>c) Ability to arrange inspection at the end of the warranty periods.</li> </ul>
1 item	Complete project closeout. (143)	<ul style="list-style-type: none"> <li>a) Ability to participate in a post-construction review in conjunction with construction team.</li> <li>b) Ability to prepare project closeout report.</li> <li>c) Ability to prepare a post-occupancy report</li> <li>d) Ability to disperse of personnel.</li> </ul>