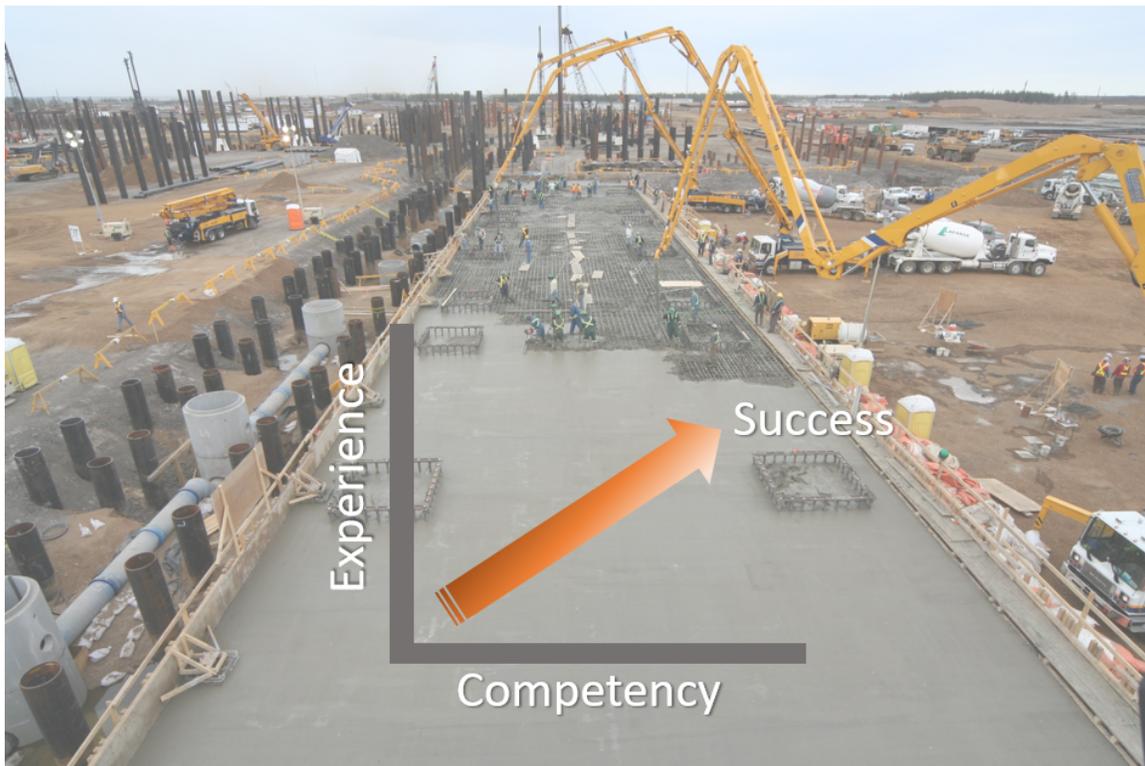


## Construction Management Competency Tool

### A Best Practices Guideline



Suggestions for improvement are welcome and can be submitted directly to COAA. Note that Version 1.0 of this guideline will be reviewed after approximately one year; user suggestions are particularly valuable in the inaugural year and should be submitted before March 2020 in order to inform the preparation of Version 2.0.

This Best Practice guideline ("guideline") was developed through a consensus process approved by COAA. This process brings together volunteers representing varied viewpoints and interests to achieve a reasonable consensus on a generic guideline for industry use. The content of this guideline does not represent the views of any particular committee member. This document is a general guideline and COAA strongly recommends legal and other professional advice being obtained to complement and clarify specific adopting of this guideline. This guideline is also subject to periodic review and readers should ensure they are referencing the most current version of this guideline. Suggestions for improving this guideline are welcome and can be submitted directly to COAA.

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## Best Practice Document Components

**Construction Management Competency Tool – Users Guide  
PART I**

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5-20 of full PDF

**Construction Management Competency Tool - Validators Guide  
PART II**

Pages: 2-7 of Part II  
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PART III**

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**Construction Management Competency Tool – Users Guide**

**A Best Practice of the  
Construction Owners Association of Alberta**

**PART I**

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## 1. Introduction

### 1.1. Purpose

The purpose of the Construction Management Competency Tool is to provide the Alberta Industrial construction industry with a means to assess, validate and manage the competencies of construction personnel at the management level. This tool was developed by members of the COAA Workforce Development Committee.

Using the Construction Management Competency Tool, participants will gain more understanding of the competency levels required for various construction management positions. This tool may also be used to help participants identify areas requiring additional training and experience for career advancement.

The competency self-assessment tool enables participants to evaluate themselves based on the Construction Management Competency Framework. The self-assessment tool consists of:

- **The Self & Guided Assessment:** This is the main sheet used to perform the self-evaluation, record supporting information and add pertinent comments.
- **Rating Scales to Use:** This sheet breaks down the rating criteria for both the proficiency rating scale and the confidence rating scale. This sheet should be used as reference to select the appropriate responses from the dropdown options.
- **Dropdowns:** This sheet provides lists of values (responses) that the self-evaluator can insert into each column of the evaluation sheet. This sheet is not required for reference by the self-evaluator and does not need to be visible to the self-evaluator.
- **Validation sheets:** Allowing a validator to assess the participant's competency based on one-on-one discussions of the self-evaluation.
- **Report Summary:** A summary of the evaluator's findings.

### 1.2. Scope of Use

This tool can be amended for use by construction management professionals within all construction industries. These industries include, but are not limited to:

- Oil and gas facility and pipeline construction
- Commercial construction
- Industrial construction
- Hospital and medical facility construction
- Civil and infrastructure construction

*Etc.*

### 1.3. Overview of the Construction Management Competency Tool

This user guide will explain the following:

1. A Competency Management Lifecycle; and
2. The purpose of and how to use the components of the Competency Tool. The components of the Competency Tool include:
  - a. The Construction Management Competency Framework
  - b. The Competency Self-Assessment Tool
  - c. The Competency Validation Tool
  - d. The Competency Assessment & Validation Report

## 2. Typical Competency Management Lifecycle

A robust Competency evaluation program requires continuous monitoring and allows for participant improvement and potential growth. This tool was developed with a competency management program in mind. The basis for a competency management program is as follows:

The construction competency management lifecycle is presented in **Figure 1**.

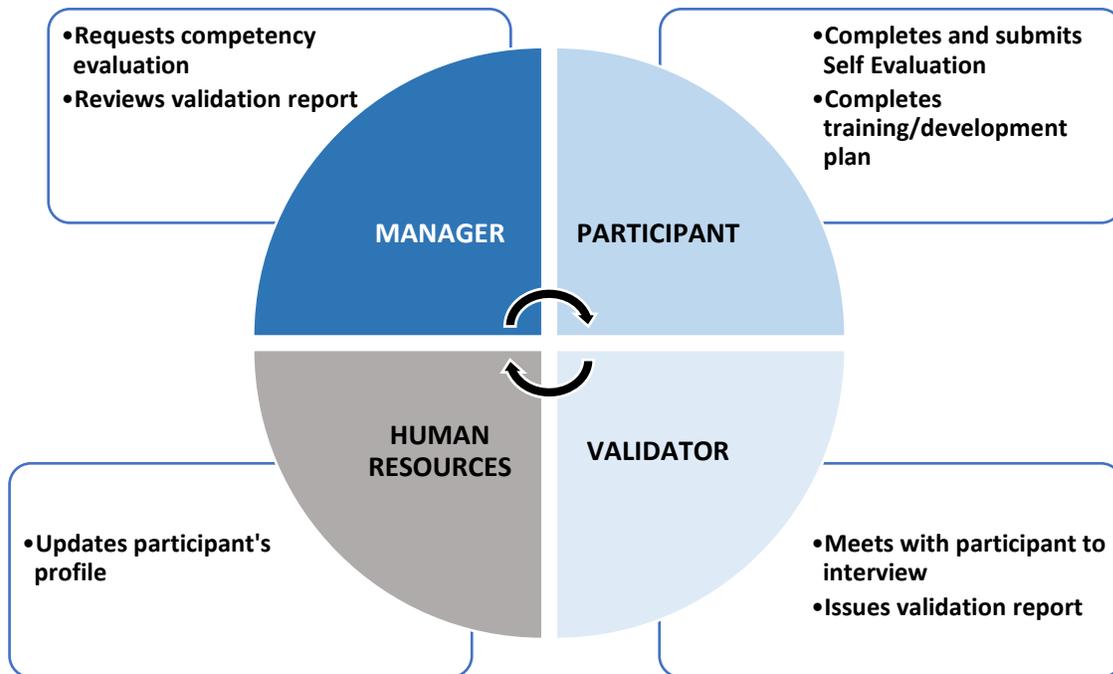


Figure 1: The Assessment & Validation Lifecycle

As shown in **Figure 1**, the competency management lifecycle typically begins with a request from the participant’s manager. The manager request that the competency assessment tool be completed by the participant. The participant completed the self-assessment exercise and submits the completed assessment to an assigned validator for review.

The validator receives the completed Competency Assessment Tool then sets up a validation meeting to interview the participant. This interview typically lasts 3 hours and is conducted such that the validator can verify the participant’s competencies against the completed self-assessment. At this point the validator will draft a validation report using the submitted self-assessment and findings from the interview with the participant.

After it is completed by the validator, the validation report will be issued both to human resources and the participant’s manager. Human resources will use the validation report to update the participant’s competency profile.

The participant’s manager will review the validation report. If the report suggests that the participant go through training, and the participant’s manager confirms this need, the manager will request the participant to complete training.

### 3. Components of the Competency Tool (Tabs of the Excel document)

#### 3.1. Welcome Tab

#### 3.2. Self-Guided Assessment Tab

The purpose of this tab is to allow the participant to record their name and job information and then act as their worksheet for inputting their self-evaluation ratings. All other tabs will link back to the information provided in this tab. The participant must have a rudimentary knowledge of inputting their information into an excel document.

Key features of the worksheet are as follows:

A pick menu of the competency groups can be utilized (highlighted below) in **Figure 2**.

**Construction Management Competency Self Evaluation**

Instructions: For full instructions please see the associated user guide\*

1. Populate Name and position information
2. Complete assessment on each competency group using the dropdown buttons below
3. For more detail on each competency expand "grouped cells" on the left of the page next to competency

Name of Individual	John Doe
Position Title	Construction Superintendent
Competency Role (see "Rating Scales to Use" tab for more information)	Tier 1 Construction Superintendent
Business Unit:	Industrial Projects
Reports to:	Jane Smith

Minimize when section above is completed

**ASSESSMENT OF KEY COMPETENCIES**

Construction Planning | Construction Execution | Fabrication Contractor | Construction Infrastructure | Construction Contractor | Construction Safety | Construction Procurement | Environmental and Regulatory Compliance | Business Systems and Processes | Construction Learning and Development | Soft Skills

Show All

For task information related to a competency, click on "+" (left of page) to expand on tasks. Click on "-" to hide tasks.

Competency Groups	Competency	Proficiency Self Rating (use number from scale on Tab2)	Confidence Rating (use number from scale on Tab2)	Select the Importance of Each Competency Performed	Select the Frequency of Each Competency Performed	Need or Want More Training/ Learning	Comment Field (add comments or more detail on your selection, including which type of training you may want)
[Grouped Cell]	Manage Construction Planning						
	Administer Construction Schedule						
	Support Construction Cost Estimates and Quantities Development						
	Manage Construction Risk Assessment & Analysis						

Welcome | **Self-Guided Assessment** | Rating Scales to Use | Competency Framework-Rat ...

Figure 2: Self-Guided Assessment Tab

The Self-Guided Assessment group chosen shows the competencies to be evaluated in grey. When those evaluations are complete the grey area will change to white. For additional information on the competency the competencies relevance the participant can select the ‘+’ key on the left most side of the page to open additional information at the task level.

For additional information refer to **Figure 3. Self-Guided Assessment Tab Expansion** below.

ASSESSMENT OF KEY COMPETENCIES

Construction Planning | Construction Execution | Fabrication Contractor | Construction Infrastructure | Construction Contractor | Construction Safety | Construction Procurement | Environmental and Regulatory Compliance | Business Systems and Processes | Construction Learning and Development | Soft Skills

For task information related to a competency, click on "+" (left of page) to expand on tasks. Click on "-" to hide tasks. Incomplete items highlighted grey

Competency Groups	Competency	Proficiency Self Rating (use number from scale on Tab2)	Confidence Rating (use number from scale on Tab2)	Select the Importance of Each Competency Performed	Select the Frequency of Each Competency Performed	Need or Want More Training/ Learning	Comment Field (add comments or more detail on your selection, including which type of training you may want)	
Construction Planning	Manage Construction Planning							
	Administer Construction Schedule							
	<i>Use and develop Construction Cost Estimates and Quantities</i>							
	<i>Apply types of estimator (Factor-based, A'-based, Bottom-up, different classes, etc.)</i>							
	Support Construction Cost Estimates and Quantities Development	3	3	Is important	Few times / year	NO		
	Manage Construction Risk Assessment & Analysis							
	Manage Construction Stakeholders Interfaces							
	Develop and Implement Labour Management Plan							
Support Engineering Practices and Processes (MOCs, LOPA, HAZOP, etc.)								

Welcome | Self-Guided Assessment | Rating Scales to Use | Competency Framework-Rat ...

Figure 3: Self-Guided Assessment Tab Expansion

### 3.3. Ratings Scales to Use Tab

The purpose of the Rating scales is to provide a measurement of proficiency for each competency as shown in the **Proficiency Rating Scale**. In addition, a rating is required for the level of confidence the participant has in that competency outlined in the **Confidence Rating Scale** provided.

When filling out the Self-Guided assessment information the participant can choose the industry level that best suits their working role and responsibility. More information is available in the **Construction Management Roles** area to identify the best classification.

### 3.4. Competency Framework – Ratings Tab

The purpose of the Construction Management Competency Framework is to provide a reference for how each competency is broken down to establish the criteria by which each task and competency is to be measured.

The Framework:

- Shows the competency group;

- Provides a description of each competency that is being assessed in that group;
- Provides a description of the tasks involved for each competency; and
- Incorporates a description of each level of scoring that will be associated with one of those tasks in an evaluation exercise.

identifies 10 competency groups, 31 competencies and 81 example tasks.

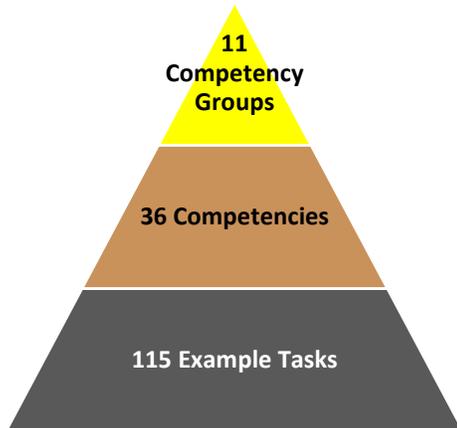


Figure 4: Competency Framework Breakdown

**The competencies and tasks presented in the framework provides a baseline of competencies that are applicable to all construction industries. Companies using this tool can choose to modify the framework to better reflect specific industry, company requirements, scope of participant’s responsibilities, etc.**

### 3.5. Validator’s Tab

This tab is generally kept hidden to the participant and is for validators use only (See Construction Management Competency Tool - Validators Guide)

### 3.6. CM Competency Framework- Validate Tab

This tab is generally kept hidden to the participant and is for validators use only (See Construction Management Competency Tool - Validators Guide)

#### **Report Summary Tab**

The report summary is a document outlining the findings of the validator. It is prepared by the validator after a validation session has concluded. This is a summary document capturing areas of expertise, areas where training would be beneficial, and areas where career growth may exist.

Refer to the “Report Summary” tab of the tool for additional information. See **Figure 5** below for a visual representation.

Construction Competency Assessment  
Report

Personnel Name:	John Doe
Position Title:	Construction Superintendent
Business Unit:	Industrial Projects
Personnel's Supervisor:	Jane Smith
Date of Validation:	Monday, February 25, 2019
Location of Validation:	Nevada, Hoover Dam
Validator:	Gordon Kaufmann

**1 COMPETENCY SUMMARY**

Item	Value
Total number of competencies for profile	36
Number of competencies "needs training"	5
Number of competencies for career growth opportunity	8
Number of competencies "not applicable"	0

**2 VALIDATOR'S COMMENTS**

**3 PERSONNEL COMPETENCY DEVELOPMENT PLAN (IF APPLICABLE)**

**4 CAREER GROWTH OPPORTUNITYS**

**5 ATTACHEMENTS**

Figure 5: Construction Competency Assessment Report

### 3.7. The Validation Tool

The purpose of the competency validation tool is to enable the validator to record notes, recommend possible training opportunities, and validate the participant’s level of competence based on their role in the company. The validation tool is contained within the validators tab of the competency tool. The validation tool uses colour coding techniques to assist the validator to better prepare for validating a self-assessment by highlighting potential areas of strength and concern. Green, yellow, and red colours and buttons are used to indicate various level of severity.

### 3.8. The Assessment and Validation Report

The purpose of this report is to outline the findings of the validation process and any suggested training or career growth opportunity that the participant may benefit from. The validator will

generate the report and issue to the participant, the participants manager, and copy to Human Resources.

### 3.9. How to Use the Self-Assessment Tool

Before performing the self-evaluation, fill out the personal information form at the top of the excel spreadsheet with your name, position title, competency role, business unit and who you report to in your current role.

To input a competency role first select the competency role input field. Once the cell is selected, click the downward facing arrow in the bottom right corner of the cell to reveal the drop down menu, then select the competency role that most closely matches your current role as a construction management professional.

Refer to the “Rating Scales to Use” tab for a description of each listed competency role. See **Figure 6** and **Figure 14** below for a visual representation

**Construction Management Competency Self Evaluation**

Instructions: For full instructions please see the associated user guide\*

1. Populate Name and position information
2. Complete assessment on each competency group using the dropdown buttons below
3. For more detail on each competency expand "grouped cells" on the left of the page next to competency

Name of Individual: John Doe  
 Position Title: Construction Superintendent  
 Competency Role (see 'Rating Scales to Use' tab for more information): Tier 2 Construction Superintendent  
 Business Unit:  
 Reports to:

ASSESSMENT OF KEY COMPETENCIES

Construction Planning | Construction Execution | Fabrication Contractor | Construction Infrastructure | Construction Contractor | Construction Safety | Construction Procurement | Environmental and Regulatory Compliance | Business Systems and Processes | Construction Learning and Development | Soft Skills

For task information related to a competency, click on "+" (left of page) to expand on tasks. Click on "-" to hide tasks. Incomplete items highlighted grey

Competency Groups	Competency	Proficiency Self Rating (use number from scale on Tab2)	Confidence Rating (use number from scale on Tab2)	Select the Importance of Each Competency Performed	Select the Frequency of Each Competency Performed	Need or Want More Training/ Learning	Comment Field (add comments or more detail on your selection, including which type of training you may want)
	Manage Construction Planning						
	Administer Construction Schedule						

Figure 6: Personnel Information Form

Next, identify the competency you want to assess. Refer to columns A and B in the Self-Guided Assessment sheet. Here, the competencies are broken down by competency group and then by competency. If you prefer to select a single competency group rather than the full list select one of the grey competency boxes shown in the figure above.

Once you have identified a competency to assess, each competency can be expanded to reveal a list of tasks that can be associated with that competency. To expand each listed competency, click on the square button bearing an addition symbol '+' in the left margin of the page that is in the same row as the competency you want to expand. See **Figure 7** and **Figure 8** below for a visual representation:

8	Click on "+" to expand on tasks related to the Competencies. Click on "-" to hide tasks.		
9	Competency Groups	Competency	Proficiency Self Rating (use number from scale on Tab2)
48	<b>Construction Execution</b>	Manage Construction Performance and Progress including Schedule, Cost and Quantities (part of Construction Project Controls)	1
53		Support Construction Quality Assurance and Control (QA/QC)	2
55		Manage Construction and Fabrication Processes, Standards, and Procedures	1
57		Apply Technical Drawings for execution of Construction Projects	2

Figure 7: Construction Management Competencies

Click on the minus '-' to roll up

8	Click on "+" to expand on tasks related to the Competencies. Click on "-" to hide tasks.		
9	Competency Groups	Competency	Proficiency Self Rating (use number from scale on Tab2)
43	<b>Construction Execution</b>	Develop construction reports, forecasting, etc.	
44		Verify contract billing approvals, on-value analysis, etc... Use quantity surveillance	
45		Request and use cost and account codes	
46		Manage construction document control	
47		Identify applicable construction reporting requirements	
48		Manage Construction Performance and Progress including Schedule, Cost and Quantities (part of Construction Project Controls)	

Figure 8: Competencies Expanded

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After a competency has been identified and you are able to expand the list of related tasks, refer to columns D and E. These columns are used to record the participant’s self-assessment for any given competency by rating their proficiency for that competency on a scale of 1-5, as well as providing a confidence rating on a scale of 1-4. To assign a rating:

1. Select a cell within the proficiency self-rating column or the confidence rating column
2. Click the downward facing arrow at the bottom right corner of the cell to open the drop down menu
3. Select one of the numerical values listed within the drop down menu to assign a rating to a competency

See **Figure 9** below for a visual representation:

	A	B	D	F	G	H	I	
1	<b>Construction Management Competency Self Evaluation</b>							
2		<b>Personnel Name:</b>	John Doe					
3		<b>Position Title</b>	Construction Superintendent					
4		<b>Competency Role (see 'Rating Scales to Use' tab for more information)</b>	Tier 3 Construction Superintendent					
5		<b>Business Unit:</b>	Industrial Projects					
6		<b>Reports to:</b>	Jane Smith					
7	Click on "+" to expand on tasks related to the Competencies. Click on "-" to hide tasks.							
9	Competency Groups	Competency	Proficiency Self Rating (use number from scale on Tab2)	Confidence Rating (use number from scale on Tab2)	Select the Importance of Each Competency Performed	Select the Frequency of Each Competency Performed	Need or Want More Training/ Learning	Self-Evaluator's Comment on which type
25		Support Construction Cost Estimates and Quantities Development	2	2	Is important	Monthly	NO	I would like an opportunity to estimate or actively involved
28	Construction Planning	Manage Construction Risk Assessment & Analysis	2	2	Is important	Monthly	NO	
		Manage Construction Stakeholder Interface	2	2	Is important	Every time I use	NO	

*Figure 9: Proficiency Self Rating Column*

Select the importance of each competency performed in column F by clicking on the input field, opening the drop-down menu, and selecting “Not at all”, “Is important” or “Critical”. See **Figure 10** below for a visual reference:

	F	G	H	
<b>Evaluation</b>				
John Doe				
Construction Superintendent				
Tier 3 Construction Superintendent				
Industrial Projects				
Jane Smith				
Competency Self (use from Tab2)	Confidence Rating (use number from scale on Tab2)	Select the Importance of Each Competency Performed	Select the Frequency of Each Competency Performed	Need More Learning
	2	Is important	Weekly	
	2	Not at all Is important Critical	Daily	

Figure 20: Importance of Competency Column

In column G, select the frequency of each competency performed by clicking in the input field, opening the drop down menu, and selecting “Never”, “Yearly”, “Few times/year”, “Weekly” or “Daily”. See **Figure 11** below for a visual reference:

	G	H	I	
John Doe				
Construction Superintendent				
Tier 3 Construction Superintendent				
Industrial Projects				
Jane Smith				
Importance (use from Tab2)	Select the Importance of Each Competency Performed	Select the Frequency of Each Competency Performed	Need or Want More Training/ Learning	Self
	Is important	Weekly	NO	I would
	Critical	Never Yearly Few times / year Monthly Weekly Daily	YES	I would be ac

Figure 31: Frequency of Competency Column

Select the need or want for more training pertaining to each competency by selecting the input field in column H, opening the drop down menu, and selecting “YES”, “NO”, “Want Mentor”, “Want Coach” or “Don’t Know”. See **Figure 12** below for a visual reference:

H		I
endent		
intendent		
s		
Select the Frequency of Each Competency Performed	Need or Want More Training/Learning	Self-Evaluator's Comment on which type of training
Weekly	NO	I would like an opportunity to manage complex projects
Daily	<div style="border: 1px solid black; padding: 2px;">                     YES                      Want Mentor                      Want Coach                      Don't Know                 </div>	I would like an opportunity to be actively involved in the design

Figure 42: Need or Want More Training/Learning Column

Column I contains the Self-Evaluator’s Comment Field. Use this field to note down any pertinent comments or clarifications relating to each competency, if applicable. See **Figure 13** below for a visual reference:

J	
Self-Evaluator's Comment Field (add comments or more detail on which type of training you may want in this column)	
I would like an opportunity to manage the construction / project planning on complex projects.	

Figure 53: Self Evaluator's Comment Field

Refer to the “Rating Scale to Use” tab to view detailed criteria for scoring these two categories. See **Figure 14** below for an example.

	A	B	C	D
1				
2	<b>PROFICIENCY RATING SCALE - use the numbers on the self-assessment</b>			
3	<b>Rating</b>	<b>Proficiency</b>	<b>Details</b>	
4	<b>1</b>	No Knowledge	Has very little to no knowledge; does not have skill required for competency	
5	<b>2</b>	Awareness	Has knowledge; isn't actually performing the work; or isn't applying skills (may not have attained skills yet)	
6	<b>3</b>	Basic Application	Applies existing or new skills but generally needs feedback or supervision	
7	<b>4</b>	Skilled Application	Is fully qualified/capable; is self-initiating; can be deemed competent	
8	<b>5</b>	Mastery/Expert	Highly skilled; usually can perform cross-functionally; advanced troubleshooting; coaches others or manages	
9				
10				
11	<b>CONFIDENCE RATING SCALE - use the numbers on the self-assessment</b>			
12	<b>Rating</b>	<b>Can Coach/Mentor Others</b>	<b>Details</b>	
13	<b>1</b>	No knowledge of competency and not comfortable to coach/mentor others	Does not have knowledge of competency and not comfortable to coach/mentor others	
14	<b>2</b>	Not overly comfortable coaching/mentoring others	Still needs to ask others to confirm technical knowledge & skills	
15	<b>3</b>	Willing to coach/mentor others	Can demonstrate to others the concepts and skills required	
16	<b>4</b>	Coaches/mentors others easily, intuitively (automatically)	Can explain without effort in plain language to others the concepts and skills required by demonstrating, providing comparisons, scenarios and	
17				
18				
19	<b>Construction Management Roles - use for the self-assessment</b>			
20	<b>Role</b>	<b>Details</b>		
21	<b>Construction Director</b>	Highly experienced (Canadian and International) in managing, planning and execution of projects of various sizes and complexities up to mega project level		
22	<b>Tier 1 Construction Manager</b>	Highly experienced in managing, planning and execution of projects of various sizes and complexities up to mega project level		
23	<b>Tier 2 Construction Manager</b>	Experienced in managing planning and execution of projects of various sizes and complexities up to \$150MM		
		Experienced in managing planning and execution of projects of various		
	Self-Guided Assessment	Rating Scales to Use	Competency Framework-Ratings	Validator's

Figure 64: Proficiency and Confidence Rating Scale Criteria

3.10. How to Use the Competency Assessment and Validation Report

1. The validator will fill out the report including pertinent information regarding the participant, the participant’s manager and the validation within the form at the top of the report template. (See Validators User Guide)

<b>Personnel Name:</b>	John Doe
<b>Position Title:</b>	Construction Superintendent
<b>Business Unit:</b>	Industrial Projects
<b>Personnel's Supervisor:</b>	Jane Smith
<b>Date of Validation :</b>	December 25, 2017
<b>Location of Validation:</b>	Edmonton Field Office
<b>Validator:</b>	Gordon Haufmann

<b>1 COMPETENCY SUMMARY</b>	
-----------------------------	--

Item	Value
Total number of competencies for profile	31
Number of competencies "needs training"	5
Number of competencies for career growth opportunity	8
Number of competencies "not applicable"	0

<b>2 VALIDATOR'S COMMENTS</b>	
<p>John Doe shows an excellent grasp of the major concepts of Construction Management. John would benefit from some additional experience coupled with minor coaching and mentoring to ensure he maintains confidence while learning. Identified competencies show areas for improvement.</p>	

<b>3 PERSONNEL COMPETENCY DEVELOPMENT PLAN (IF APPLICABLE)</b>	
<p>Validator to meet with John Doe's manager to discuss plan</p>	

<b>4 CAREER GROWTH OPPORTUNITY</b>	
<p>John Doe shows an understanding of Construction Management Competencies at the Tier 3 Construction Superintendent level.</p>	

<b>5 ATTACHMENTS</b>	
<p>Construction Competency Assessment report</p>	

Figure 15 Competency Assessment and Validation Report

## 4. Definitions and Glossary

Term	Definition
<b>Competency</b>	A critical area of skills and knowledge in the construction management profession. A specific area of skills and knowledge pertaining to one part of a construction manager's potential duties.
<b>Confidence Rating</b>	A measure of the participant's confidence with regards to dealing with the various competencies are included in the tool. The competency assessment tool enables users to rate a participant's confidence on a scale of 1 to 3. Confidence is rated based on how intuitive it is for a participant to perform tasks related to these competencies, and how well they can coach those skills and competencies to others if needed.
<b>Proficiency Rating</b>	A measure of the participant's ability to perform and demonstrate the various competencies are included in the tool. The competency assessment tool enables users to rate a participant's proficiency on a scale of 1 to 4.
<b>Validator</b>	The person tasked with both reviewing a participant's self-guided assessment and interviewing a participant to verify a participant's level of competency. Validator's are typically highly experienced professionals in the same construction industry as the participant who is being assessed.
<b>"Want Coach"</b>	Coach is someone who can be called from time to time to work on a specific problem or concern. A Coach is someone who has demonstrated a solid understanding of a particular competency and can act in an advisory role for that concern.
<b>"Want Mentor"</b>	A mentor is someone who will take an ongoing interest in a participant's development of skills required in a competency. They are typically someone who can provide leadership as well as expertise.

## 5. Appendices



**Construction Management Competency Tool – Validators Guide**

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**PART II**

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## 1. Introduction

### 1.1. Purpose

2. The purpose of the Construction Management Competency Tool is to provide the Alberta Industrial construction industry with a means to assess, validate and manage the competencies of construction personnel at the management level. This tool was developed by members of the COAA Workforce Development Committee.

The purpose of this Validators guide is to allow for effective management of the Construction Management Competency Tool. This tool is meant to be used in two parts: 1) to allow a participant to perform a self-administered evaluation of their competencies in Construction Management tailored to their current role; 2) to allow a subject matter expert to validate the data supplied by the participant and draw some measurable conclusions.

To achieve this a degree of customization may be required for the tool to be most effective. The tool has been pre-loaded with a suit of competencies that a construction management professional may need in large scale Industrial Construction. It is expected that a subject matter expert will be able to choose or modify those competencies which are necessary for the participant. COAA has chosen to provide this tool in an Excel document to ensure that customization can take place.

Prior to any customization a good working knowledge of the base tool coupled with rudimentary Excel skills will be required. Please consult the Construction Management Competency Tool User Guide for initial information on how the tool will be used by the participant. The validator will be required to make themselves familiar with all aspects of the tool and competency program. They will act as subject matter expert in administering this tool.

### 2.1. Scope of Use

This tool is intended for the use by construction management professionals within all construction industries. These industries include, but are not limited to:

- Oil and gas facility and pipeline construction
- Commercial construction
- Industrial construction
- Hospital and medical facility construction
- Civil and infrastructure construction
- Etc.

### 2.2. Overview of the Construction Management Competency Tool

This user guide will explain the:

1. A Competency Management Lifecycle; and
2. The purpose of and how to use the components of the Competency Tool. The components of the Competency Tool include:
  - a. The Construction Management Competency Framework

- b. The Competency Self-Assessment Tool
- c. The Competency Validation Tool
- d. The Competency Assessment & Validation Report

### 3. Typical Competency Management Lifecycle

A robust Competency evaluation program requires continuous monitoring and allows for participant improvement and potential growth. This tool was developed with a competency management program in mind. The basis for a competency management program is as follows:

The construction competency management lifecycle is presented in **Figure 1**.

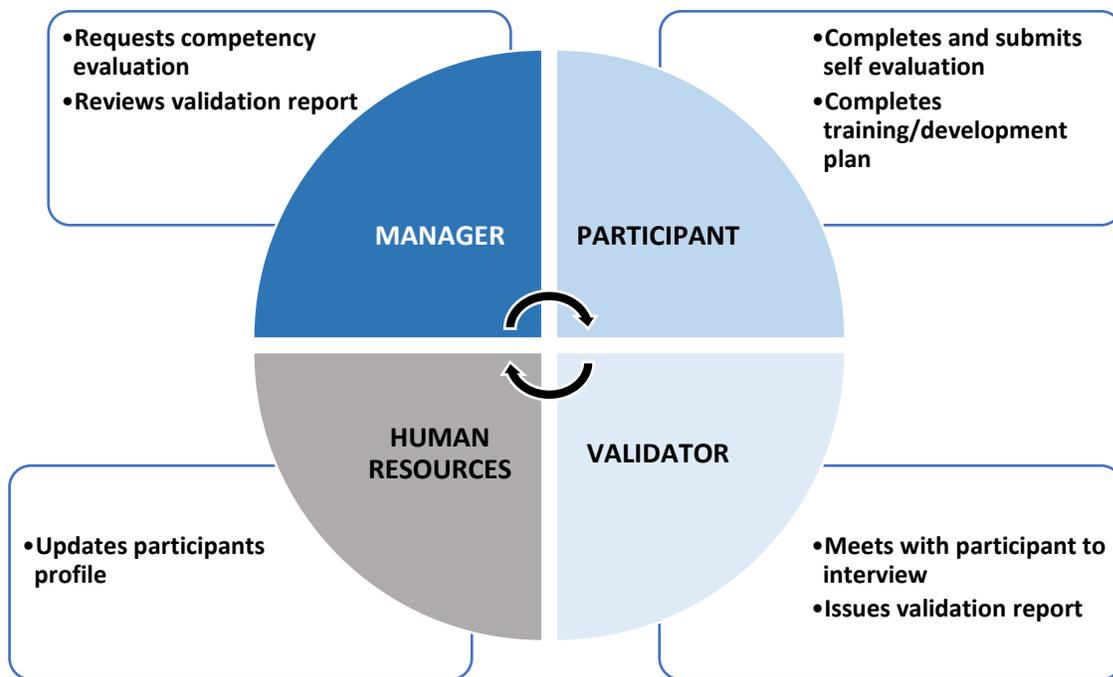


Figure 1: The Assessment & Validation Lifecycle

As shown in **Figure 1**, the competency management lifecycle typically begins with a request from the participant’s manager. The manager request that the competency assessment tool be completed by the participant. The participant completes the self-assessment exercise and then submits the completed assessment to an assigned validator for review.

The validator receives the completed Competency Assessment Tool then sets up a validation meeting to interview the participant. This interview typically lasts 3 hours and is conducted such that the validator can verify the participant’s competencies against the completed self-assessment. At this point, the validator will draft a validation report using the submitted self-assessment and findings from the interview with the participant.

After completion by the validator, the validation report will be issued both to human resources and the participant's manager. Human resources will use the validation report to update the participant's competency profile.

The participant's manager will review the validation report. If the report suggests that the participant should go through training, and the participant's manager confirms this need, the manager will request the participant to complete training.

The participant may then be required to go through a specific training and development plan, as per request from the participant's manager.

## 4. Components of the Competency Tool

### 4.1. Participant Tabs

Components of the Tool can be found in the User Guide section. This section will focus on the validator's areas of the tool. Within the tool there are various tabs that the participant will use to complete their self-assessment. The validator may elect to hide and lock the 'validator's' tab, the 'CM Competency Framework- Validate ' tab, and the 'Report Summary' tab prior to the participants evaluation to avoid any confusion. If so, an adjustment to the Construction Management Competency Tool User Guide will be necessary to delete reference to these tabs.

### 4.2. The Validator's Tab

The validation tool is contained within the validator's tab of the competency tool. The purpose of the validator's tab is to enable the validator to record notes, recommend possible training opportunities and validate the participant's level of competence based on their role in the company. This is done by conducting a one-on-one interview.

The validation tool uses colour coding techniques based on the participant's inputs to assist the validator to better prepare for validating a self-assessment. This is done by highlighting potential areas of strength and concern. Green, yellow and red colors, as well as buttons, are used to indicate various level of severity which the validator can spend more time evaluating.

For additional information see Fig. 2 The Validators Tab below.

# COAA Construction Management Competency Tool – User Guide

**Construction Management Competency Self Evaluation: Validator's Tab**

Name of Individual: John Doe  
 Position Title: Construction Superintendent  
 Competency Role (based on Competency Framework): Tier 1 Construction Superintendence  
 Business Unit: Mechanical Projects Unit  
 Reports to: Jane Smith  
 Validator Name: Gordon Robinson  
 Validator Position / Title: Human Resources Construction Director

**ASSESSMENT OF KEY COMPETENCIES**

Construction Planning | Construction Execution | Fabrication Contractor | Construction Infrastructure | Construction Contractor | Construction Safety | Construction Procurement | Environmental and Regulatory Compliance | Business Systems and Processes | Construction Learning and Development | Soft Skills

Show All

Click on "+" to expand on tasks related to the Competencies. Click on "-" to hide tasks.

Competency Groups	Competency	Proficiency Role Requirement	Proficiency Self Rating (use number from scale on Tab2)	Result (Use formula)	Confidence Rating (Use number from scale on Tab2)	Select the Importance of Each Competency Performed	Select the Frequency of Each Competency Performed	Need or Want More Training/Learning	Validator's Focus/Direction	Validator's Proficiency Rating	Comment Field (add comments or more detail on your selection, including which type of training you may want)	Validator's Comment Field (add comments or more detail on which type of training you may want in this column)
Construction Planning	Manage Construction Planning											
	Administer Construction Schedule											
	Support Construction Cost Estimates and Quantities Development											
	Manage Construction Risk Assessment & Analysis											
	Manage Construction Stakeholders Interfaces											
	Develop and Implement Labour Management Plan											

Welcome | Self-Guided Assessment | Rating Scales to Use | Competency Framework-Ratings | **Validator's Tab** | CM Competency Framework-Validat | Report Summary

Figure 2: The Validators Tab

### 4.3. The Assessment and Validation Report

The purpose of this report is to outline the findings of the validation process and any suggested training or career growth opportunity that may benefit the participant. After the validator has completed the one-on-one interview, the validator will generate the report and issue it to the participant, the participant’s manager, and copy to Human Resources. See **Figure 3** below for a visual representation:

### 4.4. How to Use the Competency Assessment and Validation Report

1. Begin the report by filling out pertinent information regarding the participant, the participant’s manager and the validation information within the form at the top of the report template.
2. Complete section 1 of the report by filling out the competency summary table. This table requires that fields be filled that pertain to:
  - Total number of competencies for the participants profile;
  - Number of competencies which have been given “needs training” status;
  - Number of competencies that are given a “career growth opportunity” status; and
  - Number of competencies which do not apply to a participant
3. Next, record any comments that arose as a result of reviewing the participant’s self-assessment or the validation process in “Section 2: Validator’s Comments”. This is also an opportunity to note any observations where the participant may be utilized as a coach or mentor to others depending on their level of competency.

4. Include information regarding any personnel competency development plan that is applicable to the participant in Section 3 of the Competency Assessment Report.
5. Record any career growth opportunities that have been identified for the participant as a result of the participant having gone through the assessment and validation process in section 4.
6. If applicable, include any relevant and necessary attachments at the end of the report.

See **Figure 3** below for a full view of the Construction Competency Assessment Report Template:

<b>Personnel Name:</b> John Doe
<b>Position Title:</b> Construction Superintendent
<b>Business Unit:</b> Industrial Projects
<b>Personnel's Supervisor:</b> Jane Smith
<b>Date of Validation :</b> December 25, 2017
<b>Location of Validation:</b> Edmonton Field Office
<b>Validator:</b> Gordon Haufmann

<b>1 COMPETENCY SUMMARY</b>
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Item	Value
Total number of competencies for profile	31
Number of competencies "needs training"	5
Number of competencies for career growth opportunity	8
Number of competencies "not applicable"	0

<b>2 VALIDATOR'S COMMENTS</b>
John Doe shows an excellent grasp of the major concepts of Construction Management. John would benefit from some additional experience coupled with minor coaching and mentoring to ensure he maintains confidence while learning. Identified competencies show areas for improvement.

<b>3 PERSONNEL COMPETENCY DEVELOPMENT PLAN (IF APPLICABLE)</b>
Validator to meet with John Doe's manager to discuss plan

<b>4 CAREER GROWTH OPPORTUNITY</b>
John Doe shows an understanding of Construction Management Competencies at the Tier 3 Construction Superintendent level.

<b>5 ATTACHMENTS</b>
Construction Competency Assessment report

Figure 3: Competency Assessment and Validation Report

## 5. Components of the Competency Tool

For additional information regarding the use of the competency tool please see the Construction Management Competency Tool - Users Guide.

## 6. Definitions and Glossary

Term	Definition
<b>Competency</b>	A critical area of skills and knowledge in the construction management profession. A specific area of skills and knowledge pertaining to one part of a construction manager's potential duties.
<b>Confidence Rating</b>	A measure of the participant's confidence with regards to dealing with the various competencies included in the tool. The competency assessment tool enables users to rate a participant's confidence on a scale of 1 to 3. Confidence is rated based on how intuitive it is for a participant to perform tasks related to these competencies and how well they can coach those skills and competencies to others if needed.
<b>Proficiency Rating</b>	A measure of the participant's ability to perform and demonstrate the various competencies included in the tool. The competency assessment tool enables users to rate a participant's proficiency on a scale of 1 to 4.
<b>Validator</b>	The person tasked with both reviewing a participant's self-guided assessment and interviewing a participant to verify a participant's level of competency. Validator's are typically highly experienced professionals in the same construction industry as the participant that is being assessed.
<b>"Want Coach"</b>	A coach is someone who can be called from time to time to work on a specific problem or concern. A coach is someone who has demonstrated a solid understanding of a particular competency.
<b>"Want Mentor"</b>	A mentor is someone who will take an ongoing interest in development of the skills required in a competency. It is typically someone who can provide leadership as well as expertise.

## 7. Appendices



**Construction Management Competency Tool – Self Evaluation**

**A Best Practice of the  
Construction Owners Association of Alberta**

**PART III**

## **Welcome to the Construction Management Competency Validation Tool!**

*COAA is pleased to present this tool which will allow a participant to perform a self evaluation to show strengths and weaknesses within the competencies of Construction Management*

*By evaluating these competencies, areas for growth can be seen which can support career development. In addition areas of potential leadership will also be apparent.*

*To perform a self evaluation first make yourself comfortable with the User Guide associated with this evaluation tool. If you have any questions while performing your self evaluation please see the user guide for more details.*

## Construction Management Competency Self Evaluation

Instructions : For full instructions please see the associated user guide\*

1. Populate Name and position information
2. Complete assessment on each competency group using the dropdown buttons below
3. For more detail on each competency expand "grouped cells" on the left of the page next to competency

<b>Name of Individual</b>	John Doe
<b>Position Title</b>	Construction Superintendent
<b>Competency Role (see 'Rating Scales to Use' tab for more information)</b>	Tier 1 Construction Superintendent
<b>Business Unit:</b>	Industrial Projects Unit
<b>Reports to:</b>	Jane Smith

<- Minimize when section above is completed  
**ASSESSMENT OF KEY COMPETENCIES**

For task information related to a competency, click on "+" (left of page) to expand on tasks. Click on "-" to hide tasks.

Incomplete Items highlighted grey

Competency Groups	Competency	Proficiency Self Rating (use number from scale on Tab2)	Confidence Rating (use number from scale on Tab2)	Select the Importance of Each Competency Performed	Select the Frequency of Each Competency Performed	Need or Want More Training/ Learning	Comment Field (add comments or more detail on your selection, including which type of training you may want)
<b>Construction Planning</b>	Manage Construction Planning						
	Administer Construction Schedule						
	Support Construction Cost Estimates and Quantities Development						
	Manage Construction Risk Assessment & Analysis						
	Manage Construction Stakeholders Interfaces						
	Develop and Implement Labour Management Plan						
	Support Engineering Practices and Processes (MOCs, LOPA, HAZOP, etc.)						
	Plan and Execute Construction Completions, Turnover, and Closeout						
<b>Construction Execution</b>	Manage Construction Performance and Progress including Schedule, Cost and Quantities (part of Construction Project Controls)						
	Support Construction Quality Assurance and Control (QA/QC)						
	Manage Construction and Fabrication Processes, Standards, and Procedures						

	Apply Technical Drawings for execution of Construction Projects						
<b>Fabrication Contractor</b>	Manage Fabrication Contractor						
	Manage Fabrication Quality Assurance and Control (QA/QC)						
<b>Construction Infrastructure</b>	Manage Temporary Construction Facilities, Construction Security, Site Access, and Site Services						
<b>Construction Contractor</b>	Manage Construction Contractors						
	Manage Labour Relations for Construction Contractors and/or Employees						
<b>Construction Safety</b>	Manage Construction Incidents						
	Manage Compliance to Construction Safety Requirements Per Jurisdiction						
	Manage Compliance to Construction Permitting Requirements						
	Manage Emergency Response Plan (ERP) Per Jurisdiction						
<b>Construction Procurement</b>	Support Procurement and Contracting Strategy Development						
	Support Transportation and Logistics Strategy Development						
<b>Environmental and Regulatory Compliance</b>	Maintain Company's License to Operate						
	Manage Regulatory Requirements Per Jurisdiction						
	Monitor Compliance with Environmental Regulatory Requirements Per Jurisdiction						
<b>Business Systems and Processes</b>	Perform work in accordance with Company's policies and business processes						
	Use Company's Business Applications						
<b>Construction Learning and Development</b>	Perform Learning and Development Needs Assessment						
	Develop, Deliver and Facilitate Learning and Development Solutions						
	Evaluate Learning and Development Solutions Effectiveness						
<b>Soft Skills</b>	Demonstrate Leadership Ability						
	Apply Negotiation and Crisis Resolution Skills						
	Ethics						
	Use Interpersonal Skills						
	Demonstrate Cultural Competence						

**PROFICIENCY RATING SCALE - use the numbers on the self-assessment**

Rating	Proficiency	Details
1	No Knowledge	Has very little to no knowledge; does not have skill required for competency
2	Awareness	Has knowledge; isn't actually performing the work; or isn't applying skills (may not have attained skills yet)
3	Basic Application	Applies existing or new skills but generally needs feedback or supervision
4	Skilled Application	Is fully qualified/capable; is self-initiating; can be deemed competent
5	Mastery/Expert	Highly skilled; usually can perform cross-functionally; advanced troubleshooting; coaches others or manages

**CONFIDENCE RATING SCALE - use the numbers on the self-assessment**

Rating	Can Coach/Mentor Others	Details
1	No knowledge of competency and not comfortable to coach/mentor others	Does not have knowledge of competency and not comfortable to coach/mentor others
2	Not overly comfortable coaching/mentoring others	Still needs to ask others to confirm technical knowledge & skills
3	Willing to coach/mentor others	Can demonstrate to others the concepts and skills required
4	Coaches/mentors others easily, intuitively (automatically)	Can explain without effort in plain language to others the concepts and skills required by demonstrating, providing comparisons, scenarios and examples

**Construction Management Roles - use for the self-assessment**

Role	Details
<b>Construction Director</b>	Highly experienced (Canadian and International) in managing, planning and execution of projects of various sizes and complexities up to mega project level
<b>Tier 1 Construction Manager</b>	Highly experienced in managing, planning and execution of projects of various sizes and complexities up to mega project level
<b>Tier 2 Construction Manager</b>	Experienced in managing planning and execution of projects of various sizes and complexities up to \$150MM
<b>Tier 3 Construction Manager</b>	Experienced in managing planning and execution of projects of various sizes and complexities up to \$10MM
<b>Tier 1 Construction Superintendent</b>	Highly experienced in execution of projects of various sizes and complexities with scope responsibilities up to mega project level

<b>Tier 2 Construction Superintendent</b>	Experienced in execution of projects of various sizes and complexities with scope responsibilities up to \$150MM
<b>Tier 3 Construction Superintendent</b>	Experienced in execution of projects of various sizes and complexities with scope responsibilities up to \$10MM
<b>Tier 1 Construction Coordinator</b>	Highly experienced in execution of project coordination related to various sizes and complexities up to large projects or scope of work areas.
<b>Tier 2 Construction Coordinator</b>	Experienced in execution of project coordination related to various sizes and complexities from small to medium sized projects or scope of work areas.
<b>Construction Planner</b>	Experienced in building and maintaining construction schedules, critical paths, advanced work packaging, construction sequencing

## Construction Management Competency Framework

Competency Group	Competency	Description (Tasks)	No Knowledge (1)	Awareness (2)	Basic (3)	Skilled (4)	Mastery (5)
Construction Planning	Manage Construction Planning	<p>Use and/or develop construction plan (e.g. Construction Execution Plan (CEP), job book, etc.)</p> <p>Provide construction input in planning phases of the project (e.g. constructability reviews, model reviews, issued for assessment (IFA) reviews, etc.)</p> <p>Apply Workforce Planning / Advanced Work Packaging</p> <p>Use and/or develop Construction Work Packages (CWP's), Engineering Work Packages (EWP's), etc.</p> <p>Apply modularization and feasibility planning</p> <p>Apply construction sequencing to planning phases of the project</p> <p>Use heavy haul planning and restrictions (e.g. transportation corridor, rail/ship/truck, weight and size, etc.)</p> <p>Execute Construction Lift Planning, Cranes , and Rigging Requirements</p> <p>Use Construction Critical Path understanding in Construction Planning</p>	Does not possess knowledge of construction planning concepts, activities and requirements. Unable to support construction planning activities.	Have knowledge of construction planning concepts, activities and requirement. Able to support construction planning activities as directed.	Participate in construction planning activities and requirements. Able to support construction planning activities with supervision.	Able to manage (including initiate and lead) construction planning activities and requirements;	Highly trained and/or experienced (in managing planning and execution of projects of various sizes and complexities). Able to coach and mentor others. Able to determine construction planning and execution strategies.
	Administer Construction Schedule	Use and develop Construction Schedules	Does not possess knowledge of key project activities, schedule milestones and schedule linkages required to support schedule monitoring and impacts to schedule forecasting.	Have knowledge of key project milestones and schedule linkages. Able to support schedule monitoring and impacts to schedule forecasting	Manage contracts and project deliverables with respect to construction schedule with guidance	Manage contracts and project deliverables with respect to construction schedule. Create construction schedules, using Company's approved scheduling tools and disseminate to stakeholders.	Highly trained and/or experienced (in administering construction schedule planning with respect to projects of various sizes and complexities). Ability to coach and mentor others; Advocate for scheduling tool selection and process improvement
	Support Construction Cost Estimates and Quantities Development	<p>Use and develop Construction Cost Estimates and Quantities</p> <p>Apply types of estimates (Factor-based, K-based, Bottom-up, different classes, etc.)</p>	Does not possess knowledge of key project activities, schedule milestones and strategic procurement planning that most affect estimates. Unable to support construction cost estimates and quantity development with supervision.	Have knowledge of key project activities and quantities as well as schedule milestones and strategic procurement planning that most affect estimates. Able to support construction cost estimates and quantity development with supervision	Develop, under guidance, cost estimates of various types. Gather information for estimate reviews and provide input from various stakeholders/sources.	Create project cost estimates including use of industry recognized estimating benchmarks	Highly trained and/or experienced (in administering construction schedule planning with respect to projects of various sizes and complexities). Ability to coach and mentor others, justify decision making for estimate type
	Manage Construction Risk Assessment & Analysis	<p>Use qualitative and quantitative Risk Assessment &amp; Analysis AND mitigate</p> <p>Use 7x7 risk matrix</p>	Unable to identify types of risk categories and have little to no knowledge of risk controls. Unable to use a risk matrix using Company's risk panning techniques.	Able to identify various types of risk categories and have in-depth knowledge of risk controls. Able to use a risk matrix using Company's risk planning techniques, with guidance.	Able to implement various mitigations with respect to Risk Management and implement and monitor with supervision. Contact sources for risk support and risk controls data/ information.	Conduct risk planning sessions, and work through risk controls using strategic solutions and analyses.	Highly trained and/or experienced (in administering construction risk management with respect to projects of various sizes and complexities); Able to coach and mentor others;; justify decision making for risk planning; advocate for change of processes and sources of data
	Manage Construction Stakeholders Interfaces	<p>Identify and Manage Construction Stakeholders</p> <p>Identify and Manage Customer and Public Relations</p> <p>Identify and Manage Construction Interfaces</p>	Does not possess knowledge of required stakeholders interfaces. Unable to support communication and interface between identified stakeholders.	Have knowledge of stakeholders interfaces required. Able to support communication and interfaces between identified stakeholders with direction	Able to manage construction stakeholders and support communication and interfaces between identified stakeholders with some direction	Able to effectively communicate with stakeholders without supervision and create stakeholder strategies and reports	Highly trained and/or experienced (in stakeholder management with respect to projects of various sizes and complexities). Able to coach and mentor others, justify decision making for stakeholder management; advocate for Company's interface management strategies
	Develop and Implement Labour Management Plan	<p>Apply Labour Market opportunities and availabilities (e.g. current labour market analyses)</p> <p>Develop and Implement Labour Management Plan and Requirements</p>	Possess inbasic knowledge of project labour requirements related to labour types. inbasic knowledge of key roles on construction project.	Have knowledge of project labour requirements related to labour types as they apply locally with market fluctuation. Have knowledge of key roles on construction project.	Able to obtain further information on labour codes and requirements. Can support labour planning and construction organizational planning under guidance.	Able to apply labour regulations and requirements related to labour classifications. Able to manage labour both contractually and through execution. Able to implement organizational roles and responsibilities	Highly trained and/or experienced (in Labour management with respect to projects of various sizes and complexities).Able to coach and mentor others. Able to direct labour strategies.

Competency Group	Competency	Description (Tasks)	No Knowledge (1)	Awareness (2)	Basic (3)	Skilled (4)	Mastery (5)
	Support Engineering Practices and Processes (MOCs, LOPA, HAZOP, etc.)	Support engineering activities during planning and execution (model reviews, HAZOP/LOPA, etc.)	Does not possess knowledge of key engineering practices and processes	Have knowledge of key engineering practices and processes	Able to provide support to engineering practices and processes with supervision	Able to provide support to engineering practices and processes without supervision. Able to apply construction impacts to various engineering process	Highly trained and/or experienced (in Engineering Processes with respect to projects of various sizes and complexities); Able to coach and mentor others; Able to provide leadership to engineering for construction-focused impacts
	Plan and Execute Construction Completions, Turnover, and Closeout	Coordinate Mechanical Completions (MC) and Turnover (including binders) Requirements Coordinate Commissioning and Start-up Requirements Coordinate Process Safety Start-up Review (PSSR) Requirements Support Construction Contracts Closeout Support Construction Post Project Review and Lessons Learned	Does not possess knowledge of processes and planning required to move MC through to startup. Unable to obtain further information required to support the planning at all phases of project from MC to start-up.	Have knowledge of process and planning required to move from MC through to startup. Able to obtain further information and have the ability to support planning at all phases of project from MC to start-up	Able to review and support contractual requirements and Company's procedures and requirements for MC through start-up with direction	Able to review and support contractual requirements and Company's procedures and requirements for MC through start-up. Able to capture	Highly trained and/or experienced (in Project completions with respect to projects of various sizes and complexities) Able to coach and mentor others
Construction Execution	Manage Construction Performance and Progress including Schedule, Cost and Quantities (part of Construction Project Controls)	Develop construction reports, forecasting, etc.	Possess no knowledge of use of various construction reports. Possess inbasic knowledge of construction code of accounts and contract billing line items and budgets.	Have knowledge of use of various construction reports. Have knowledge of construction code of accounts and contract billing line items and budgets	Support the creation, review, and use of construction reports. Able to obtain further information on budget line items and contractor billing. Able to verify work completed by line item.	Implement the creation, review, and use of construction reports. Able to apply budget expenditures to construction line items. Measure contractor completions for billing to line items and provide approvals to the approval process.	Highly trained and/or experienced (in Construction Performance with respect to projects of various sizes and complexities). Able to coach and mentor others. Able to define construction reporting requirements; Advocate for process improvement and provide direction with regards to mitigations for Cost, Schedule, and Performance
		Verify contract billing approvals, on-value analysis, etc.... Use quantity surveillance					
		Request and use cost and account codes					
		Manage construction document control					
	Support Construction Quality Assurance and Control (QA/QC)	Identify applicable construction reporting requirements	Lacks knowledge of various construction QA/QC applicable to the project that is required to be able to support various construction QA/QC requirements.	Have knowledge of various construction QA/QC applicable to the project. Able to support various construction QA/QC requirements under supervision	Able to implement, review, provide acceptance, and use construction QA/QC requirements with some direction	Able to implement, including creation, review, acceptance, and use of construction QA/QC requirements	Highly trained and/or experienced (in Construction QA/QC requirements and plans with respect to projects of various sizes and complexities). Able to coach and mentor others.
		Identify applicable codes and specifications					
Manage requirements for spec deviations							
Manage Construction and Fabrication Processes, Standards, and Procedures	Apply regulatory & jurisdictional requirements to construction activities	Lacks knowledge of the company's and industry standards related to fabrication processes, construction processes, workforce planning and transportation.	Have knowledge of Company's and industry best practices and standards related to Fabrication processes, Construction Processes, workforce planning, transportation, etc.	Able to, under supervision, develop construction and fabrication processes, standards, and procedures regarding workforce planning, construction execution planning, transportation, etc., using Company's and industry best practices and Standards	Able to develop construction and fabrication processes, implement jurisdictional standards, and adopt procedures regarding workforce planning, construction execution planning, transportation, etc., using Company's and industry best practices	Champion construction and fabrication processes, standards, and procedures. Highly trained and/or experienced (in Construction QA/QC requirements and plans with respect to projects of various sizes and complexities) Ability to coach and mentor others	
	Understand Codes Inspection requirements (e.g. inspection timing, applicable certifications - CSA/ULC, etc.)						
Apply Technical Drawings for execution of Construction Projects	Identify and apply best practices within Company's and industry to develop and implement construction and fabrication processes, standards, and procedures that relate to: - Workforce planning - Construction execution planning - Transportation, heavy lift and hauling - Labour Relations - Fabrication timelines - MC and TCCC - Etc.	Lacks the knowledge of the different types of drawings and their use to the project. Unable to interpret drawing information to communicate or direct work.	Have the knowledge of the different types of drawings and their use to the project. Interpret drawing information to communicate or direct work with supervision	Interpret drawing information to communicate or direct work. Be able to build infrastructure based on drawings with limited guidance	Be fully fluent in interpreting and updating drawings (providing redlines for submittal). Be able to build infrastructure based on drawings	Highly trained and/or experienced; (in Construction issued drawing requirements and plans with respect to projects of various sizes and complexities). Able to be a proponent of drawing document control related to updates and revision control and to coach and mentor others.	
Manage Fabrication Contractor	Manage Fabrication Timelines (e.g. Required At Site (RAS) dates, Material Handling, Scheduling and Planning, and other fabrication timelines) Manage Fabrication Contractor Performance Manage Fabrication Contract Terms and Conditions	Does not possess knowledge of Company's and project's fabrication management processes and requirements. Unable to support fabrication timelines, performance, and contract management.	Have knowledge of Company's and project fabrication management processes and requirements. Support fabrication timelines, performance, and contract management with supervision	Able to support fabrication timelines, performance, and contract management using Company's and project processes and requirements with limited guidance	Implement fabrication timelines, performance, and contract management using Company's and project processes and requirements	Highly trained and/or experienced to plan, implement, troubleshoot fabrication contractor management including fabrication timelines, performance and contract management; Able to coach and mentor others	

Competency Group	Competency	Description (Tasks)	No Knowledge (1)	Awareness (2)	Basic (3)	Skilled (4)	Mastery (5)
Fabrication Contractor	Manage Fabrication Quality Assurance and Control (QA/QC)	Administer Fabrication Quality Plan for example: - Review Material Test Reports - Review and Approve Weld Procedures - Inspection Test Plans - Conduct Fabrication Shop Inspections - Review Repair Procedures - Witness Factory and/or Shop Acceptance Testing - Witness and Approve Electrical Testing - Witness and Approve Mechanical Testing - Manage Non-Conformance Reporting - Witness and Approve Non Destruction Examination (NDE)	Does not possess knowledge of quality requirements related to QA/QC needed to support QA/QC requirements, inspections, testing and non-conformance processes and procedures.	Have knowledge of quality requirements related to QA/QC, including the need for ITP's; identify stakeholders/contacts for inspections and non-conformances. Support QA/QC requirements, inspections, testing and non-conformance processes and procedures with supervision	Able to support QA/QC requirements, inspections, testing and non-conformance processes and procedures with limited guidance; Engage key contacts and sources of information related to the components of a project quality plan.	Implement Quality Plan requirements to fabrication activities including inspections (ITP), testing, Non-conformance and planning to ensure resources are present as needed.	Highly trained and/or experienced to plan, implement and troubleshoot contractual quality requirements within the scope of work; advocate for process and testing improvements; Able to coach and mentor others
Construction Infrastructure	Manage Temporary Construction Facilities, Construction Security, Site Access, and Site Services	Implement Temporary Construction Facilities, Security, Access and Service including: - Construction Personnel Onboarding and Orientation - Implement Construction Site Security - Manage Fire and Medical - Implement Construction Laydown Methodology - Manage Utilities (Gas, Propane, Electricity, Internet, Water, etc.) - Roads (Maintenance, Ditches, etc.) - Manage Construction Site Logistics (Camp, Vehicles, Radio, etc.) - Manage Construction Camp Requirements	Does not possess knowledge of project infrastructure needs, timing required for them, and infrastructure impact on projects of different categories. Unable to support planning and implementation of infrastructure components with supervision.	Have knowledge of project infrastructure needs, timing for them and impact on projects of different categories. Able to support planning and implementation of infrastructure components with supervision	Able to support planning and implementation of infrastructure components with limited guidance	Able to plan and implement requirements contractually and support estimate using infrastructure components at the requirements and code level.	Highly trained and/or experienced to ensure site access and services support the needs of the project and personnel in an efficient and regulatory compliant manner. Able to coach and mentor others.
Construction Contractor	Manage Construction Contractors	Ensure Construction Contractors Mobilization and Demobilization compliance (on-board, HSE orientation, Company's policies, site -specific requirements, kick off, align on scope, schedule, materials, etc.)	Does not possess knowledge of construction contracts regarding contracts, and quality and performance management relating to contracts. Lacks knowledge of required certifications to complete scopes of work, by work type. Unable to support the administration of a contract, including contractor performance.	Have knowledge of construction contracts related to projects, sequence of construction related to contracts, and quality and performance requirements related to contracts. Have knowledge of required certifications to do "the work" by work type. Able to support the administration of a contract, including contractor performance with supervision.	Able to support the administration of a contract, including contractor performance with limited guidance	Able to manage the performance of the Contractor within the contract scope of services and requirements. Able to provide strategy to support to all elements related to the contract and the successful execution of the contract.	Highly trained and/or experienced in providing effective contract strategy management to achieve contract success. Able to plan and implement contractual requirements to ensure project certification requirements are within scope. Able to coach and mentor others
		Manage Construction Contractor Performance (recovery plans, dispute resolution, etc.)					
Construction Contractor	Manage Labour Relations for Construction Contractors and/or Employees	Oversee Construction Contractors Trades Certificates / Tickets (Journeyman, Apprentice, Welder certifications, job specific certifications, etc.)	Lacks necessary knowledge regarding project labour requirements related to labour types as they apply locally with market fluctuation. Unable to support labour planning and construction organizational planning.	Have knowledge of project labour requirements related to labour types as they apply locally with market fluctuation. Able to support labour planning and construction organizational planning with supervision.	Able to obtain further information on labour codes and requirements. Able to support labour planning and construction organizational planning with limited guidance.	Able to apply labour regulations and requirements related to labour classifications. Able to manage labour both contractually and through execution. Able to implement organizational roles and responsibilities	Highly trained and/or experienced in providing effective direction for labour management strategies. Able to coach and mentor others.
		Manage Construction Contract Terms and Conditions					
Construction Safety	Manage Construction Incidents	Oversee Construction Contractors Documentation Requirements (e.g. Includes technical documentation, commercial documentation, legal documentation, regulatory documentation, personnel documentation, operational documentation, vendor master documentation, preservation documentation, as-built, etc.)	Apply Labour Law, Employment Standard, Agreements and Codes (labour types - open shop, union, temporary foreign worker program, etc.)	Use Construction Organizational Chart for assigning key roles and responsibilities to projects	Participate in incident management including investigation and implementation of corrective action(s) with limited guidance	Able to apply labour regulations and requirements related to labour classifications. Able to manage labour both contractually and through execution. Able to implement organizational roles and responsibilities	Highly trained and/or experienced in providing effective direction for labour management strategies. Able to coach and mentor others.
		Manage incident investigation and corrective actions					
	Manage Compliance to Construction Safety Requirements Per Jurisdiction	Implement incident management process	Does not possess basic knowledge of incident management requirements and procedures. Unable to participate in incident management.	Have knowledge of incident management requirements and procedures and participate in incident management with supervision	Participate in incident management including investigation and implementation of corrective action(s) with limited guidance	Participate in incident management including investigation and implementation of corrective action(s) without supervision	Manage incident "under jurisdictional authority" including investigation and implementation of corrective action(s)
		Conduct Hazard Identification and Assessments	Lacks knowledge of safety codes, regulations, laws, and requirements pertaining to the construction site. Unable to obtain further information of site construction safety requirements.	Have knowledge of safety codes, regulations, laws, and requirements pertaining to the construction site. Able to obtain further information on site construction safety requirements.	Implement project safety requirements as well as input into the safety planning for various tasks. Able to monitor aspects of safety program in some tasks with guidance.	Able to implement all elements of safety program to identify gaps and hazards. Able to supervise and oversee safety programs. Have direct planning input into safety program.	Able to set up a projects safety program. Know where to draw appropriate support. Highly trained and/or experienced as well as able to coach and mentor others
		Perform Job Safety Assessments, etc.	Apply Bill C-45	Lacks knowledge regarding site construction permitting requirements. Unable to "pull a permit".	Have knowledge of and be able to obtain further information on site construction permitting requirements. Able to "pull a permit" under guidance.	Able to "pull a permit" and/or issue a permit. Able to oversee SIMOPS planning with limited guidance.	Able to issue a permit or direct that a permit be issued through permitting process, able to oversee SIMOPS planning. Able to implement Permit control requirements.
Manage Compliance to Construction Permitting Requirements	Implement Controlling Authority	Manage Simultaneous Operations (SIMOPS)	Implement Lock out / Tag out (LOTO)	Able to participate in emergency response preparedness planning. Able to monitor compliance to the elements of the ERP with limited guidance.	Able to create, review and provide input and acceptance of the ERP with key stakeholders. Able to provide supervision of the ERP at the field level.	Able to provide direction to and manage project ERP. Highly trained and/or experienced; Able to coach and mentor others	
	Manage different types of permits						
Manage Emergency Response Plan (ERP) Per Jurisdiction	Develop and/or Implement: - Medical / First Aid Plan - Incident Management Plan - Fire Response / Management Plan - Spill Response Plan - Rescue Plan	Lacks necessary knowledge of emergency response plans related to fire/medical/incident requirements. Unable to participate in emergency response preparedness planning.	Have knowledge of emergency response plans related to fire/medical/incident requirements. Able to participate in emergency response preparedness planning with supervision.	Able to participate in emergency response preparedness planning. Able to monitor compliance to the elements of the ERP with limited guidance.	Able to create, review and provide input and acceptance of the ERP with key stakeholders. Able to provide supervision of the ERP at the field level.	Able to provide direction to and manage project ERP. Highly trained and/or experienced; Able to coach and mentor others	

Competency Group	Competency	Description (Tasks)	No Knowledge (1)	Awareness (2)	Basic (3)	Skilled (4)	Mastery (5)
Construction Procurement	Support Procurement and Contracting Strategy Development	<p>Conduct Technical Bid Evaluations</p> <p>Participate in development of Scope of Work (SOW), Request for Proposal (RFP), Request for Information (RFI), Request for Quotations (RFQ), Etc.</p> <p>Develop, implement, and execute Contract Change Management at Construction Site</p> <p>Support Contracting strategies development including lump-sum, cost reimbursable, unit rate, turn-key, design build, cost plus, IPD, etc.</p>	Lacks necessary knowledge regarding processes related to contract management and how to obtain support. Unable to support various portions of contract management.	Have knowledge of process related to contract management and who, how and when to seek support. Able to support various portions of contract management with supervision.	Able to support various portions of contract management. Ensure compliance with Company's Contract Management requirements and process with limited guidance.	Able to implement contract management process. Provide support to contracting strategies and vendor selection.	Highly trained and/or experienced in providing contracting strategy development expertise. Ensure project process meets Company's contractual requirements. Able to coach and mentor others.
	Support Transportation and Logistics Strategy Development	<p>Implement materials management activities (preservation, receiving, etc.) and materials data reporting</p> <p>Manage personnel movement processes and coordinate transportation activities to worksite (flights, boats, bussing, etc.)</p> <p>Manage equipment and materials transportation and restrictions (e.g. transportation corridor, rail/ship/truck, weight and size, etc.)</p>	Lacks knowledge of various transportation and logistics project requirements and the major impacts within each category. Unable to support the development of various transportation and project logistics requirements.	Have knowledge of various transportation and logistics project requirements and the major impacts to the project within each category. Able to support the development of various transportation and logistics project requirements with supervision.	Able to support the development of various transportation and logistics project requirements with limited guidance.	Able to support the implementation of the various transportation and logistics project requirements	Highly trained and/or experienced in supporting the development and implementation of strategic sourcing for transportation and logistics ; Able to coach and mentor others;
Environmental and Regulatory Compliance	Maintain Company's License to Operate	<p>Comply with operating license requirements</p> <p>Document and report regulatory infractions</p>	Does not possess knowledge of Company's License to Operate requirements. Unable to comply with Company's License to Operate requirements.	Have knowledge of and comply with Company's License to Operate requirements with supervision	Comply with Company's License to Operate requirements with limited guidance	Comply with Company's License to Operate requirements	Manage construction's compliance with Company's License to Operate requirements, and advocate for changes as applicable
	Manage Regulatory Requirements Per Jurisdiction	<p>Perform or participate in regulatory inspections</p> <p>Follow inspection protocols and processes</p> <p>Identify regulatory non-compliances</p> <p>Provide data and information to regulators</p> <p>Follow processes and recommendations to rectify/resolve non compliance</p> <p>Retain documents and provide required reports</p>	Lacks knowledge of perform work regulatory permits relevant to the project purpose and requirements. Unable to perform work per those regulatory permits.	Have knowledge of and perform work per regulatory requirements relevant to the project - purpose and requirements with supervision	Able to perform work per regulatory requirements relevant to the project with limited guidance	Able to perform work per regulatory requirements relevant to the project, without supervision	Highly trained and/or experienced in managing work per regulatory requirements relevant to the project and implement resolution methods as required.
	Monitor Compliance with Environmental Regulatory Requirements Per Jurisdiction	<p>Apply regulatory environmental requirements to construction activities</p>	Lacks knowledge of environmental regulatory requirements in project jurisdiction. Unable to perform work in compliance to these requirements.	Have knowledge of and perform work with codes and environmental sensitivities in project jurisdiction with supervision	Able to perform environmental regulatory compliance monitoring with limited guidance	Able to apply regulatory environmental requirements and perform environmental regulatory compliance monitoring ; Able to implement this at the construction site	Highly trained and/or experienced in various environmental regulatory requirements and compliance monitoring. Able to coach and mentor others
Business Systems and Processes	Perform work in accordance with Company's policies and business processes	<p>Use company's business processes</p> <p>Use permits/work orders systems</p> <p>Follow company's policies</p>	Does not possess knowledge of business processes and company and industry policies to perform work duties.	Have knowledge of and use business processes and company and industry policies to perform work duties with supervision	Apply knowledge of business processes and company and industry policies to perform work duties with limited guidance	Apply knowledge of business processes and company and industry policies to perform work duties	Advocate for business processes and company and industry policies to perform work duties for continuous improvement, while coaching, mentoring and assessing.
	Use Company's Business Applications	<p>Select appropriate company's approved business software and tool e.g. Use SAP, LMS, SharePoint, , DCS, Office software, Primavera P6, ESRI, etc.</p>	Does not possess knowledge of Company's approved business applications to perform work.	Have knowledge of and use Company's approved business applications to perform work with supervision	Use Company's approved business applications to perform work with limited guidance	Use Company's approved business applications to perform work	Advocate for use of or change to Company's business applications, while coaching, mentoring and assessing.
Construction Learning and Development	Perform Learning and Development Needs Assessment	<p>Determine assessment methodology and conduct needs assessment</p> <p>Analyze performance data and make recommendations</p> <p>Report learning and development needs assessment findings</p>	Does not possess knowledge of assessment methods for learning and development needs as they relate construction and fabrication management.	Have general knowledge of assessment methods for learning and development needs as it relates construction and fabrication management	Perform assessment of construction and fabrication personnel learning and development needs under supervision	Perform assessment of construction and fabrication personnel learning and development needs without supervision	Highly trained and/or experienced to advocate for assessment standardization. Able to coach and mentor others
	Develop, Deliver and Facilitate Learning and Development Solutions	<p>Develop training delivery plan</p> <p>Develop, deliver, and facilitate training modules and sessions</p>	Does not possess knowledge of learning and development needs as it relates construction and fabrication management.	Have general knowledge of learning and development needs as it relates construction and fabrication management	Develop, deliver and facilitate learning and development solutions based on assessment findings under supervision	Develop, deliver and facilitate learning and development solutions based on assessment findings without supervision	Highly trained and/or experienced to advocate learning and development solutions for construction personnel. Able to coach and mentor others
	Evaluate Learning and Development Solutions Effectiveness	<p>Receive and analyze feedback</p> <p>Implement learning and development solutions continuous improvement</p>	Does not possess knowledge of evaluation methods for learning and development needs as it relates to construction and fabrication management.	Have general knowledge of evaluation methods for learning and development needs as it relates construction and fabrication management	Use results of needs assessments and solutions delivery to evaluate the effectiveness of learning and development solutions to ensure continuous improvement under supervision	Use results of needs assessments and solutions delivery to evaluate the effectiveness of learning and development solutions to ensure continuous improvement without supervision	Highly trained and/or experienced to advocate for construction and fabrication learning and development continuous improvement. Able to coach and mentor others

**Construction Management Competency Self Evaluation: Validator's Tab**

<b>Name of Individual:</b>	John Doe
<b>Position Title</b>	Construction Superintendent
<b>Competency Role (based on Competency Framework)</b>	Tier 1 Construction Superintendent
<b>Business Unit:</b>	Industrial Projects Unit
<b>Reports to:</b>	Jane Smith
<b>Validator Name:</b>	Gordon Kaufmann
<b>Validator Position / Title:</b>	Construction Director

**ASSESSMENT OF KEY COMPETENCIES**

Click on "+" to expand on tasks related to the Competencies. Click on "-" to hide tasks.

Competency Groups	Competency	Proficiency: Role Requirement	Proficiency Self Rating (use number from scale on Tab2)	Result (use formula)	Confidence Rating (use number from scale on Tab2)	Select the Importance of Each Competency Performed	Select the Frequency of Each Competency Performed	Need or Want More Training/ Learning	Validator's Focus / Direction	Validator's Proficiency Rating	Comment Field (add comments or more detail on your selection, including which type of training you may want)	Validator's Comment Field (add comments or more detail on which type of training you may want in this column)
<b>Construction Planning</b>	Manage Construction Planning											
	Administer Construction Schedule											
	Support Construction Cost Estimates and Quantities Development											
	Manage Construction Risk Assessment & Analysis											
	Manage Construction Stakeholders Interfaces											
	Develop and Implement Labour Management Plan											
	Support Engineering Practices and Processes (MOCs, LOPA, HAZOP, etc.)											
	Plan and Execute Construction Completions, Turnover, and Closeout											
<b>Construction Execution</b>	Manage Construction Performance and Progress including Schedule, Cost and Quantities (part of Construction Project Controls)											
	Support Construction Quality Assurance and Control (QA/QC)											
	Manage Construction and Fabrication Processes, Standards, and Procedures											
	Apply Technical Drawings for execution of Construction Projects											
<b>Fabrication Contractor</b>	Manage Fabrication Contractor											
	Manage Fabrication Quality Assurance and Control (QA/QC)											



Construction Management Competency Framework

Competency Group	Competency	Description (Tasks)	No Knowledge (1)	Awareness (2)	Basic (3)	Skilled (4)	Mastery (5)	Construction Director	Tier 1 Construction Manager	Tier 2 Construction Manager	Tier 3 Construction Manager	Tier 1 Construction Superintendent	Tier 2 Construction Superintendent	Tier 3 Construction Superintendent	Tier 1 Construction Coordinator	Tier 2 Construction Coordinator	Construction Planner						
Construction Planning	Manage Construction Planning	Use and/or develop construction plan (e.g. Construction Execution Plan (CEP), job book, etc.)	Does not possess knowledge of construction planning concepts, activities and requirements. Unable to support construction planning activities as directed.	Have knowledge of construction planning concepts, activities and requirements. Able to support construction planning activities as directed.	Participate in construction planning activities and requirements. Able to support construction planning activities with supervision.	Able to manage (including initiate and lead) construction planning activities and requirements;	Highly trained and/or experienced (in managing planning and execution of projects of various sizes and complexities). Able to coach and mentor others. Able to determine construction planning and execution strategies.																
		Provide construction input in planning phases of the project (e.g. constructability reviews, model reviews, issued for assessment (IFA) reviews, etc.)																					
		Apply Workface Planning / Advanced Work Packaging																					
		Use and/or develop Construction Work Packages (CWP), Engineering Work Packages (EWP), etc.																					
		Apply modularization and feasibility planning																					
		Apply construction sequencing to planning phases of the project																					
	Administer Construction Schedule	Use and develop Construction Schedules	Use heavy haul planning and restrictions (e.g. transportation corridor, rail/ship/truck, weight and size, etc.)	Does not possess knowledge of key milestones and schedule linkages required to support schedule monitoring and impact to schedule forecasting.	Have knowledge of key project milestones and schedule linkages. Able to support schedule monitoring and impact to schedule forecasting.	Manage contracts and project deliverables with respect to construction schedule with guidance from Company's approved scheduling tools and disseminate to stakeholders.	Manage contracts and project deliverables with respect to construction schedule. Create construction schedules, using Company's approved scheduling tools and disseminate to stakeholders.	Highly trained and/or experienced (in administering construction schedule planning with respect to projects of various sizes and complexities). Able to coach and mentor others. Advocate for scheduling tool selection and process improvement.															
			Execute Construction Lift Planning, Cranes, and Rigging Requirements																				
	Support Construction Cost Estimates and Quantities Development	Use and develop Construction Cost Estimates and Quantities	Use Construction Critical Path understanding in Construction Planning	Does not possess knowledge of key project activities, schedule milestones and strategic procurement planning that most affect estimates. Unable to support construction cost estimates and quantities development with supervision.	Have knowledge of key project activities and quantities as well as schedule milestones and strategic procurement planning that most affect estimates. Able to support construction cost estimates and quantities development with supervision.	Develop, under guidance, cost estimates of various types. Gather information for estimate reviews and provide input from various stakeholders/sources.	Create project cost estimates including use of industry recognized estimating benchmarks	Highly trained and/or experienced (in administering construction schedule planning with respect to projects of various sizes and complexities). Able to coach and mentor others. Justify decision making for estimate type															
			Apply types of estimates (Factor-based, K-based, Bottom-up, different classes, etc.)																				
Management Construction Risk Assessment & Analysis	Use qualitative and quantitative Risk Assessment & Analysis AND mitigate	Use 7x7 risk matrix	Unable to identify types of risk categories and have little to no knowledge of risk controls. Unable to use a risk matrix using Company's risk planning techniques.	Able to identify various types of risk categories and have in-depth knowledge of risk controls. Able to use a risk matrix using Company's risk planning techniques, with guidance.	Able to implement various mitigations with respect to Risk Management and implement and monitor with supervision. Contact sources for risk support or risk controls data/ information.	Conduct risk planning sessions, and work through risk controls using strategic solutions and analysis.	Highly trained and/or experienced (in administering construction risk management with respect to projects of various sizes and complexities). Able to coach and mentor others. Justify decision making for risk planning, advocate for change of processes and sources of data																
		Use 7x7 risk matrix																					
Management Construction Stakeholders Interfaces	Identify and Manage Construction Stakeholders	Identify and Manage Customer and Public Relations	Does not possess knowledge of required stakeholders interfaces. Unable to support communication and interface between identified stakeholders.	Have knowledge of stakeholders interfaces required. Able to support communication and interface between identified stakeholders with direction	Able to manage construction stakeholders and support communication and interfaces between identified stakeholders with some direction	Able to effectively communicate with stakeholders without supervision and create stakeholder strategies and reports	Highly trained and/or experienced (in stakeholder management with respect to projects of various sizes and complexities). Able to coach and mentor others. Justify decision making for stakeholder management; advocate for Company's interface management strategies																
		Identify and Manage Construction Interfaces																					
Develop and Implement Labour Management Plan	Apply Labour Market opportunities and availabilities (e.g. current labour market analyses)	Develop and Implement Labour Management Plan and Requirements	Possess inbasic knowledge of project labour requirements related to labour types. Inbasic knowledge of key roles on construction project.	Have knowledge of project labour requirements related to labour types as they apply locally with market fluctuation. Have knowledge of key roles on construction project.	Able to obtain further information on labour codes and requirements. Can support labour planning and construction organizational planning under guidance.	Able to apply labour regulations and requirements related to labour classifications. Able to manage labour both contractually and through execution. Able to implement organizational roles and responsibilities	Highly trained and/or experienced (in Labour management with respect to projects of various sizes and complexities). Able to coach and mentor others. Able to direct labour strategies.																
		Support Engineering Practices and Processes (MOCs, LOPA, HAZOP, etc.)																					
Plan and Execute Construction Completions, Turnover, and Closeout	Support engineering activities during planning and execution (model reviews, HAZOP/LOPA, etc.)	Coordinate Mechanical Completions (MC) and Turnover (including binders) Requirements	Does not possess knowledge of processes and planning required to move MC through to startup. Unable to obtain further information required to support the planning at all phases of project from MC to start-up.	Have knowledge of process and planning required to move from MC through to startup. Able to obtain further information and have the ability to support planning at all phases of project from MC to start-up	Able to review and support contractual requirements and Company's procedures and requirements for MC through start-up with direction	Able to review and support contractual requirements and Company's procedures and requirements for MC through start-up. Able to capture	Highly trained and/or experienced (in Project completions with respect to projects of various sizes and complexities). Able to coach and mentor others																
		Coordinate Commissioning and Start-up Requirements																					
		Coordinate Process Safety Start-up Review (PSR) Requirements																					
		Support Construction Contracts Closeout																					
Management Construction Performance and Progress Including Schedule, Cost and Quantities (part of Construction Project Controls)	Support Construction Post Project Review and Lessons Learned	Develop construction reports, forecasting, etc.	Possess no knowledge of use of various construction reports. Possess inbasic knowledge of construction code of accounts and contract billing line items and budgets.	Have knowledge of use of various construction reports. Have knowledge of construction code of accounts and contract billing line items and budgets	Support the creation, review, and use of construction reports. Able to obtain further information on budget line items and contract billing. Able to verify work completed by line item.	Implement the creation, review, and use of construction reports. Able to apply budget expenditures to construction line items. Measure contractor completions for billing to line items and provide approvals to the approval process.	Highly trained and/or experienced (in Construction Performance with respect to projects of various sizes and complexities). Able to coach and mentor others. Able to define construction reporting requirements; Advocate for process improvement and provide direction with regards to mitigations for Cost, Schedule, and Performance																
		Verify contract billing approvals, on-value analysis, etc... Use quantity surveillance																					
		Request and use cost and account codes																					
		Manage construction document control																					
Support Construction Quality Assurance and Control (QA/QC)	Identify applicable construction reporting requirements	Identify applicable codes and specifications	Lacks knowledge of various construction QA/QC applicable to the project that is required to be able to support various construction QA/QC requirements.	Have knowledge of various construction QA/QC applicable to the project. Able to support various construction QA/QC requirements under supervision	Able to implement, review, provide acceptance, and use construction QA/QC requirements with some direction	Able to implement, including creation, review, acceptance, and use of construction QA/QC requirements	Highly trained and/or experienced (in Construction QA/QC requirements and plans with respect to projects of various sizes and complexities). Able to coach and mentor others.																
		Manage requirements for spec deviations																					
		Apply regulatory or jurisdictional requirements to construction activities																					
Construction Execution	Understand Codes Inspection requirements (e.g. Inspection Timing, applicable certifications - CSA/ULC, etc.)																						

Competency Group	Competency	Description (Tasks)	No Knowledge (1)	Awareness (2)	Basic (3)	Skilled (4)	Mastery (5)	Construction Director	Tier 1 Construction Manager	Tier 2 Construction Manager	Tier 3 Construction Manager	Tier 1 Construction Superintendent	Tier 2 Construction Superintendent	Tier 3 Construction Superintendent	Tier 1 Construction Coordinator	Tier 2 Construction Coordinator	Construction Planner
Management	Management Construction and Fabrication Processes, Standards, and Procedures	Identify and apply best practices within Company's and industry to develop and implement construction and fabrication processes, standards, and procedures that relate to: -Workforce planning -Construction execution planning -Transportation, heavy lift and hauling -Labour Relations -Fabrication timelines -MC and TCCC -Etc.	Lacks knowledge of the company and industry standards related to fabrication processes, standards, and procedures.	Have knowledge of Company's and industry best practices and standards related to fabrication processes, Construction Processes, transportation, etc.	able to, under supervision, develop construction and fabrication processes, standards, and procedures regarding workforce planning, construction execution planning, transportation, etc. using Company's and industry best practices and Standards	able to develop construction and fabrication processes, implement jurisdictional standards, and adopt procedures requiring workforce planning, construction execution planning, transportation, etc. using Company's and industry best practices	Champion construction and fabrication processes, standards, and procedures. Highly trained and/or experienced in Construction QA/QC requirements and plans with respect to projects of various sizes and complexities) Ability to coach and mentor others	5	5	4	4	3	3	3	3	2	2
	Apply Technical Drawings for execution of Construction Projects	Read, interpret, and apply P&ID's, Plot Plans, and other discipline / project specific drawings	Lacks the knowledge of the different types of drawings and their use to the project. Unable to interpret drawing information to communicate or direct work.	Have the knowledge of the different types of drawings and their use to the project. Interpret drawing information to communicate or direct work with supervision	Interpret drawing information to communicate or direct work. Be able to build infrastructure based on drawings with limited guidance	Be fully fluent in interpreting and updating drawings (providing redlines for submittals). Be able to build infrastructure based on drawings	Highly trained and/or experienced, (in Construction issued drawing requirements and plans with respect to projects of various sizes and complexities). Able to be a proponent of drawing document control related to updates and revision control and to coach and mentor others	5	5	4	4	4	4	3	3	4	3
Fabrication Contractor	Management Fabrication Contractor	Manage Fabrication Timelines (e.g. Required At Site (RAS) dates, Material Handling, Scheduling and Planning, and other fabrication timelines) Manage Fabrication Contractor Performance Manage Fabrication Contract Terms and Conditions	Does not possess knowledge of Company's and project's fabrication management processes and requirements. Unable to support fabrication timelines, performance, and contract management	Have knowledge of Company's and project's fabrication management processes and requirements. Support fabrication timelines, performance, and contract management with supervision	able to support fabrication timelines, performance, and contract management using Company's and project processes and requirements with limited guidance	Implement fabrication timelines, performance, and contract management using Company's and project processes and requirements	Highly trained and/or experienced to plan, implement, troubleshoot fabrication contractor management including fabrication timelines, performance and contract management; Able to coach and mentor others	5	5	4	4	4	3	3	3	2	2
	Management Fabrication Quality Assurance and Control (QA/QC)	Administer Fabrication Quality Plan for example: -Review Material Test Reports -Review and Approve Weld Procedures -Inspection Test Plans -Conduct Fabrication Shop Inspections -Review Repair Procedures -Witness Factory and/or Shop Acceptance Testing -Witness and Approve Electrical Testing -Witness and Approve Mechanical Testing -Manage Non-Conformance Reporting -Witness and Approve Non Destruction Examination (NDE)	Does not possess knowledge of quality requirements related to QA/QC needed to support QA/QC requirements, inspections, testing and non-conformance processes and procedures.	Have knowledge of quality requirements related to QA/QC including the need for ITP's, identify stakeholders/contacts for QA/QC requirements, testing and non-conformance processes and procedures with supervision	able to support QA/QC requirements, inspections, testing and non-conformance processes and procedures with limited guidance; Engage key contacts and sources of information related to the components of a project quality plan.	Implement Quality Plan requirements to fabrication activities including inspections (ITP's, testing, Non-conformance and planning to ensure resources are present as needed.	Highly trained and/or experienced to plan, implement and troubleshoot contractual quality requirements within the scope of work, advocate for process and testing improvements; Able to coach and mentor others	5	5	4	4	4	3	3	3	2	2
Construction Infrastructure	Management Temporary Construction Facilities, Construction Security, Site Access, and Site Services	Implement Temporary Construction Facilities, Security, Access and Service Including: -Construction Personnel Onboarding and Orientation -Implement Construction Site Security -Manage Fire and Medical -Implement Construction Laydown Methodology -Manage Utilities (Gas, Piping, Electricity, Internet, Water, etc.) -Roads (Maintenance, Ditches, etc.) -Manage Construction Site Logistics (Camp, Vehicles, Radio, etc.) -Manage Construction Camp Requirements	Does not possess knowledge of project infrastructure needs, timing required for them, and implementation of infrastructure components with supervision.	Have knowledge of project infrastructure needs, timing for them and impact on projects of different categories. Able to support planning and implementation of infrastructure components with supervision	able to support planning and implementation of infrastructure components with limited guidance	able to plan and implement requirements contractually and support estimate using infrastructure components of the requirements and code level.	Highly trained and/or experienced to ensure the access and services support the needs of the project and personnel in an efficient and regulatory compliant manner. Able to coach and mentor others.	5	5	4	4	4	3	3	2	2	2
	Management Construction Contractors	Ensure Construction Contractor Mobilization and Demobilization compliance (on-board, HSE orientation, Company's policies, site -specific requirements, kick off, align on scope, schedule, materials, etc.) Manage Construction Contractor Performance (recovery plans, dispute resolution, etc.) Oversee Construction Contractors Trades Certificates / Tickets (Journeyman, Apprentices, Welder certifications, job specific certifications, etc.) Manage Construction Contract Terms and Conditions Oversee Construction Contractors Documentation Requirements (e.g. Includes technical documentation, commercial documentation, legal documentation, regulatory documentation, personnel documentation, operational documentation, vendor master documentation, preservation documentation, as-built, etc.)	Does not possess knowledge of construction contracts regarding contracts, and quality and performance requirements related to contracts. Lacks knowledge of required certificates of work, by work type. Unable to support the administration of a contract, including contractor performance.	Have knowledge of construction contracts related to projects, sequence of construction related to contracts. Have knowledge of required certifications to do "the work" by work type. Able to support the administration of a contract, including contractor performance with supervision.	able to support the administration of a contract, including contractor performance with limited guidance	able to manage the performance of the Contractor within the contract scope of services and requirements. Able to provide strategic support to all elements related to the contract and the successful execution of the contract.	Highly trained and/or experienced in providing effective contract strategy management to achieve contract success. Able to plan and implement contractual requirements to ensure project certification requirements are within scope. Able to coach and mentor others	5	5	4	4	4	3	3	3	3	2
Construction Contractor	Management Labour Relations for Construction Contractors and/or Employees	Apply Labour Law, Employment Standard, Agreements and Codes (labour types - open shop, union, temporary foreign worker program, etc.) Use Construction Organizational Chart for assigning key roles and responsibilities to projects	Lacks necessary knowledge regarding project labour requirements related to labour types as they apply locally with market fluctuation. Unable to support labour planning and construction organizational planning.	Have knowledge of project labour requirements related to labour types as they apply locally with market fluctuation. Able to support labour planning and construction organizational planning with supervision.	able to obtain further information on labour codes and requirements. Able to support labour planning and construction organizational planning with limited guidance.	able to apply labour regulations and requirements related to labour classifications. Able to manage labour both contractually and through execution. Able to implement organizational roles and responsibilities	Highly trained and/or experienced in providing effective direction for labour management strategies. Able to coach and mentor others.	5	5	4	4	4	3	3	3	2	2
	Management Construction Incidents	Manage Incident Investigation and corrective actions Implement incident management process	Does not possess basic knowledge of incident management requirements and procedures. Unable to participate in incident management.	Have knowledge of incident management requirements and procedures and participates in incident management with supervision	Participate in incident management including investigation and implementation of corrective action(s) with limited guidance.	Participate in incident management including investigation and implementation of corrective action(s) without supervision	Manage incident "under jurisdictional authority" including investigation and implementation of corrective action(s)	5	5	5	5	4	4	4	3	3	2
Construction Safety	Management Compliance to Construction Safety Requirements Per Jurisdiction	Conduct Hazard Identification and Assessments Perform Job Safety Assessments, etc. Apply Bill C-45	Lacks knowledge of safety codes, regulations, laws, and requirements pertaining to the construction site. Unable to obtain further information on site construction safety requirements.	Have knowledge of safety codes, regulations, laws, and requirements pertaining to the construction site. Able to obtain further information on site construction safety requirements.	Implement project safety requirements as well as input into the safety planning for various tasks. Able to monitor aspects of safety program in some tasks with guidance.	able to implement all elements of safety program to identify gaps and hazards. Able to supervise and oversee safety programs. Have direct planning input into safety program.	able to set up a projects safety program. Know where to draw appropriate support. Highly trained and/or experienced as well as able to coach and mentor others.	5	5	5	5	4	4	4	3	3	2
	Management Compliance to Construction Permitting Requirements	Implement Controlling Authority Manage Simultaneous Operations (SIMOPS) Implement Lock out / Tag out (LOTO)	Lacks knowledge regarding site construction permitting requirements. Unable to "pull a permit".	Have knowledge of and be able to obtain further information on site construction permitting requirements. Able to "pull a permit" under guidance.	able to "pull a permit" and/or issue a permit. Able to oversee SIMOPS planning with limited guidance.	able to issue a permit or direct that a permit be issued through permitting process, able to oversee SIMOPS requirements. Able to implement Permit control requirements.	able to set up a permitting solution for a project. Can review permit applications and authorize "the work". Highly trained and/or experienced. Able to coach and mentor others	5	5	5	5	4	4	4	4	3	2
Management Emergency Response Plan (ERP) Per Jurisdiction	Develop and/or implement: -Medical / First Aid Plan -Incident Management Plan -Fire Response / Management Plan -Spill Response Plan -Rescue Plan	Lacks necessary knowledge of emergency response plans related to fire/medical/incident requirements. Unable to participate in emergency response preparation planning.	Have knowledge of emergency response plans related to fire/medical/incident requirements. Able to participate in emergency response preparation planning with supervision.	able to participate in emergency response preparation planning. Able to monitor compliance to the elements of the ERP with limited guidance.	able to create, review and provide input and acceptance of the ERP with key stakeholders. Able to provide supervision of the ERP at the field level.	able to provide direction to and manage project ERP. Highly trained and/or experienced. Able to coach and mentor others	5	5	5	5	4	4	3	3	3	2	2
	Support Procurement and Contracting Strategy Development	Conduct Technical Bid Evaluations Participate in development of Scope of Work (SOW), Request for Proposal (RFP), Request for Information (RFI), Request for Quotation (RFQ), etc. Develop, implement, and execute Contract Change Management at Construction Site Support Contracting strategies development including lump-sum, cost reimbursable, unit rate, turn-key, design build, cost plus, IPD, etc.	Lacks necessary knowledge regarding processes related to contract management and who, how and when to seek support. Able to obtain support various portions of contract management.	Have knowledge of process related to contract management and who, how and when to seek support. Able to support various portions of contract management with supervision.	able to support various portions of contract management. Ensure compliance with Company's Contract Management and legal process with limited guidance.	able to implement contract management process. Provide support to contracting strategies and vendor selection.	Highly trained and/or experienced in providing contracting strategy development support. Ensure project process meets Company's contractual requirements. Able to coach and mentor others.	5	5	4	4	4	3	3	2	2	2
Construction Procurement	Implement materials management activities (procurement, receiving, etc.) and materials data reporting	Lacks knowledge of various transportation and logistics project requirements and the major impacts to the project within each category. Unable to support the	Have knowledge of various transportation and logistics project requirements and the major impacts to the project within each category. Able to support the	able to support the development of various transportation and logistics project requirements with limited guidance	able to support the implementation of the various transportation and logistics project requirements	Highly trained and/or experienced in supporting the development and implementation of strategic sourcing for transportation and	5	5	4	4	4	3	3	3	4	3	2
	Support Transportation and Logistics Strategy Development	Manage personnel movement processes and coordinate transportation activities to worksite (flights, buses, boating, etc.)	Unable to support the	able to support the	able to support the	able to support the	5	5	4	4	4	3	3	3	4	3	2

Competency Group	Competency	Description (Tasks)	No Knowledge (1)	Awareness (2)	Basic (3)	Skilled (4)	Mastery (5)	Construction Director	Tier 1 Construction Manager	Tier 2 Construction Manager	Tier 3 Construction Manager	Tier 1 Construction Superintendent	Tier 2 Construction Superintendent	Tier 3 Construction Superintendent	Tier 1 Construction Coordinator	Tier 2 Construction Coordinator	Construction Planner	
Environmental and Regulatory Compliance		Manage equipment and materials transportation and restrictions (e.g. transportation corridor, rail/ship/truck, weight and size, etc.)	Does not possess knowledge of transportation and project logistics requirements.	Have knowledge of and operate project requirements with supervision.			Highly trained and/or experienced in managing work with supervision; others.											
	Maintain Company's License to Operate	Comply with operating license requirements	Does not possess knowledge of Company's License to Operate requirements. Unable to comply with Company's License to Operate requirements.	Have knowledge of and comply with Company's License to Operate requirements with supervision	Comply with Company's License to Operate requirements with limited guidance	Comply with Company's License to Operate requirements	Manage construction's compliance with Company's License to Operate requirements, and advocate for changes as applicable	5	5	5	5	4	4	4	4	3	2	
		Document and report regulatory infractions																
	Manage Regulatory Requirements Per Jurisdiction	Perform or participate in regulatory inspections																
Follow inspection protocols and processes		Lacks knowledge of perform work regulatory permits relevant to the project purpose and requirements. Unable to perform work per these regulatory permits.	Have knowledge of and perform work per regulatory requirements relevant to the project - purpose and requirements with supervision	Ability to perform work per regulatory requirements relevant to the project with limited guidance	Ability to perform work per regulatory requirements relevant to the project, without supervision	Highly trained and/or experienced in managing work per regulatory requirements relevant to the project and implement resolution methods as required.	5	5	4	4	4	4	4	3	3	3	2	
Identify regulatory non-compliances																		
Monitor Compliance with Environmental Regulatory Requirements Per Jurisdiction	Provide data and information to regulators																	
	Follow processes and recommendations to rectify/resolve non-compliance																	
Business Systems and Processes	Perform work in accordance with Company's policies and business processes	Retain documents and provide required reports	Lacks knowledge of environmental regulatory requirements in project jurisdiction. Unable to perform work in compliance to these requirements.	Have knowledge of and perform work with codes and environmental sensitivities in project jurisdiction with supervision	Ability to perform environmental regulatory compliance monitoring with limited guidance	Ability to apply regulatory environmental requirements and perform environmental regulatory compliance monitoring; Able to implement this at the construction site	Highly trained and/or experienced in various environmental regulatory requirements and compliance monitoring. Able to coach and mentor others	5	5	4	4	3	3	3	2	2	2	
		Use company's business processes																
	Use permits/work orders systems	Does not possess knowledge of business processes and company and industry policies to perform work duties.	Have knowledge of and use business processes and company and industry policies to perform work duties with supervision	Apply knowledge of business processes and company and industry policies to perform work duties with limited guidance	Apply knowledge of business processes and company and industry policies to perform work duties	Advocate for business processes and company and industry policies to perform work duties for continuous improvement, while coaching, mentoring and assessing.	5	5	4	4	4	4	3	3	2	2	2	
Use Company's Business Applications	Follow company's policies																	
	Select appropriate company's approved business software and tool e.g. Use SAP, LMS, SharePoint, DCS, Office software, Primavera P6, ERM, etc.	Does not possess knowledge of Company's approved business applications to perform work.	Have knowledge of and use Company's approved business applications to perform work with supervision	Use Company's approved business applications to perform work with limited guidance	Use Company's approved business applications to perform work	Advocate for use of or change to Company's business applications, while coaching, mentoring and assessing.	5	5	5	4	4	4	4	4	3	3	3	
Construction Learning and Development	Perform Learning and Development Needs Assessment	Determine assessment methodology and conduct needs assessment	Does not possess knowledge of assessment methods for learning and development needs as they relate to construction and fabrication management.	Have general knowledge of assessment methods for learning and development needs as they relate to construction and fabrication management	Perform assessment of construction and fabrication personnel learning and development needs under supervision	Perform assessment of construction and fabrication personnel learning and development needs without supervision	Highly trained and/or experienced to advocate learning and development solutions based on assessment findings. Able to coach and mentor others	5	4	4	4	3	3	3	2	2	2	
		Analyze performance data and make recommendations																
	Develop, Deliver and Facilitate Learning and Development Solutions	Report learning and development needs assessment findings																
		Develop training delivery plan	Does not possess knowledge of learning and development needs as it relates to construction and fabrication management.	Have general knowledge of learning and development needs as it relates to construction and fabrication management	Develop, deliver and facilitate learning and development solutions based on assessment findings under supervision	Develop, deliver and facilitate learning and development solutions based on assessment findings without supervision	Highly trained and/or experienced to advocate learning and development solutions for construction personnel. Able to coach and mentor others	5	4	4	4	3	3	3	2	2	2	
Evaluate Learning and Development Solutions Effectiveness	Develop, deliver, and facilitate training modules and sessions																	
	Receive and analyze feedback	Does not possess knowledge of evaluation methods for learning and development needs as it relates to construction and fabrication management.	Have general knowledge of evaluation methods for learning and development needs as it relates to construction and fabrication management	Use results of needs assessments and solutions delivery to evaluate the effectiveness of learning and development solutions to ensure continuous improvement under supervision	Use results of needs assessments and solutions delivery to evaluate the effectiveness of learning and development solutions to ensure continuous improvement without supervision	Highly trained and/or experienced to advocate for construction and fabrication learning and development continuous improvement. Able to coach and mentor others	5	4	4	4	3	3	3	2	2	2		

# Construction Competency Assessment Report

<b>Personnel Name:</b>	John Doe
<b>Position Title:</b>	Construction Superintendent
<b>Business Unit:</b>	Industrial Projects Unit
<b>Personnel's Supervisor:</b>	Jane Smith
<b>Date of Validation:</b>	Monday, March 11, 2019
<b>Location of Validation:</b>	<i>Nevada, Hoover Dam</i>
<b>Validator:</b>	Gordon Kaufmann

## 1 COMPETENCY SUMMARY

Item	Value
Total number of competencies for profile	36
Number of competencies "needs training"	5
Number of competencies for career growth opportunity	8
Number of competencies "not applicable"	0

## 2 VALIDATOR'S COMMENTS

## 3 PERSONNEL COMPETENCY DEVELOPMENT PLAN (IF APPLICABLE)

## 4 CAREER GROWTH OPPORTUNITYS

## 5 ATTACHEMENTS