



**PROJECT  
MANAGEMENT  
COMPETENCE  
FRAMEWORK**  
FOR ENGINEERING  
CONSTRUCTION  
INDUSTRY

---

**An Industry Guide &  
Competence Assessment  
Tool**

**[www.ecitb.org.uk](http://www.ecitb.org.uk)**

# CONTENTS

Glossary of Terms	3
Introduction	4
Development Objectives	4
About the ECI PM Competence Assessment Tool	4
Linking the Competence Tool to Staff Development	5
Benefits of using the ECI PM Competence Framework	6
How to use this tool	7
Further development	7
Acknowledgement	8
Scoring mechanism for reference	6
Project Management Levels of Competence	7
Engineering Construction Industry Project Management Competence Framework	8
Project Management Competence Self-Assessment Sheet	13

# GLOSSARY OF TERMS

Engineering Construction Industry	ECI
Engineering Construction Industry Training Board	ECITB
Project Management	PM
Learning & Development	L&D
National Occupational Standards	NOS
Royal Institute of Chartered Surveyors	RICS
Association for Project Management	APM
International Project Management Association	IPMA
Project Management Institute	PMI
Qualifications & Credit Framework	QCF
Systems & Processes	S&P

## INTRODUCTION

The Engineering Construction Industry Training Board (ECITB) has developed a new self-assessment resource for associated organisation and Project Management (PM) professionals. The aim of this resource is to evaluate current skills levels and to assist with the development of in-house learning and career development plans, in addition to helping companies identify training needs for specific projects and to ensure a good mix of skills for projects undertaken.

## DEVELOPMENT OBJECTIVES

Performance based competence standards describe what people can be expected to do in their working roles, as well as the knowledge and understanding of their occupation that is needed to underpin these roles at a specific level of competence.

A valuable aspect of such standards is that they are specifically designed for assessment purposes, and are developmental in their approach with assessment being undertaken by registered Workplace Assessors, within a well defined quality assurance process.

Since the 1990s, performance based competence standards have been developed as part of national qualifications frameworks in the United Kingdom. The simultaneous use of PM related standards within the UK and growing levels of interest in development of PM competence provided an ideal opportunity for an industry-wide review and development process that would ensure compatibility between nationally endorsed standards. This would provide a basis for rationalisation of skill requirements and a rational framework for use in an increasingly global workplace. Given that the standards need to be relevant to, and used by industry, it is important that the needs of business be recognised and addressed.

Accordingly, the new PM Competence Assessment Tool was based on, and very much in line with the recognised generic requirements of the 5 key UK recognised PM related frameworks, (discussed on page 3). This allowed a broader approach, rather than limiting organisational competence identification to one particular PM related framework as it encompasses all major requirements expected to ensure competence across the whole project function in a project environment. It was developed in conjunction with a Steering Group of PM and learning and development (L&D) professionals from a variety of fields represented by the Engineering Construction Industry (ECI).

The Framework supports the development of PM Competence in a variety of organisational areas. We developed our competence model process and the assessment tool to help project oriented enterprises to assess and develop PM Competence, and ensure their training outlays are expended on training that has previously demonstrated results in improved project performance.

**The Framework highlights generic PM competencies, across the project life-cycle, which are particularly highly sought after within the Engineering Construction Industry**, but the tool is not exhaustive and should be used in conjunction with specific Frameworks already being utilised by companies. The simple to use self-assessment aid will allow organisations and their employees to identify skills gaps and accordingly allocate skills resources more effectively. For this tool to be successful, employees should understand their own behaviours that lead to excellent performance.

This booklet provides an understanding of the competence tool, and how it can be used to ensure that current and future business objectives are met.

## ABOUT THE ECI PM COMPETENCE ASSESSMENT TOOL

The competence tool was developed in recognition of the diverse needs of Industry organisations within the ECI. It aimed to ensure that the competence framework reflect the changing market demands and future strategy of all ECI organisations; focussing on both employee and managerial requirements.

PM professionals perform a vital role in helping to deliver key organisational initiatives successfully to time, budget, quality and benefit; they are the key to providing a solution to ongoing economic constraints that are likely to be faced by many sectors, and it is important that every effort is made to ensure we have the very best professionals managing or working on our projects.

This new learning and development self-assessment tool will allow professionals to identify and remedy any skills gaps that may exist in order to ensure that they are positioned to best meet the demanding challenges faced by organisations in programme and project delivery.

It was important that the competence tool be aligned towards future business growth and development of ECI associated companies, to this end; the PM & control competencies were representational of 5 sets of PM related frameworks:

- PM NOS (National Occupational Standards) Control,
- PM NOS Leadership,
- RICS (Royal Institute of Chartered Surveyors),
- APM (Association for Project Management), and
- PMI (Project Management Institute)

These five sets were specifically selected, for the breadth of the Engineering Construction Industry, as the:

1. UK recognised standards/competencies in project control and leadership (NOS)
2. construction/surveyor specialist PM requirements (RICS) [mandatory PM competencies] and
3. best practice PM skills (APM & PMI) for the breadth of the Engineering Construction Industry

It is intended that the competence tool will provide a single-point reference tool for the key ECI PM competencies identified by the Steering Group. Using a variety of tools, including questionnaires, interviews and workshops, the group were led by the questions "What is important to good project control and management?", and "How can we ensure these competencies are represented?"

In answering these questions, specific behaviours were identified. These were combined with the latest thinking in organisational behaviour and research into transformational leadership to produce a clear, coherent competence framework. By collecting and combining this information, a standardised approach to performance was created that is clear and accessible. The competence tool outlines specifically what people need to do to be effective in their roles and it clearly establishes how those roles relate to organisational goals and success. Key considerations, (for example) APM exam intention or Qualifications & Credit Framework (QCF) qualification commitments, were also addressed.

NB. For individuals wishing to attain RICS Chartered Project Management Status (CPMS), it is important to recognise that there are additional industry-specific requirements, not met within the Competence Tool. Please refer to RICS for further clarification.

## LINKING THE COMPETENCE TOOL TO STAFF DEVELOPMENT

You may be familiar with the phrase 'what gets measured gets done.' Defining and measuring effectiveness, especially in terms of career performance and progression is now recognised as a critical task for any organisation. In which case:

- How do you define the skills, behaviours, and attitudes that workers need to perform their roles effectively?
- How do you know they're qualified for the job?

Some consider formal education as a reliable measure, others believe more in experience, or that personal characteristics can be important in their own way, but no one is sufficient on its own to provide an ideal set of behaviours and traits needed for any particular role, or that can guarantee performance to standards and levels required by the organisation.

A recognised approach is to link individual performance to the goals of the business via competencies; outlining the integrated knowledge, skills, judgment, and attributes required to perform a job effectively.

For effectiveness, the competence tool was separated into two sections; Systems & Processes (S&P) and Leadership.

Both cover very different areas in relation to management of a project, however both are equally important.

S&P are vital for ensuring control of a project, and recognition of competencies allows employees to develop in specialist, technical and knowledge areas. S&P provide 25 competencies defining identification, understanding, and execution of organisational policies and processes. This section is valid for project team members, project managers and ad-hoc employees connected with projects.

For those with management requirements, or aspiring to develop to management roles, the Leadership section provides 33 competencies which can be utilised to develop man-management "softer" skills, imperative in managing the project and Project Team members. No matter how well developed and understood the systems & processes may be, if you can't manage or inspire the team, you can't be sure these processes are followed and project requirements delivered.

For Project Managers, both competence sections are important; for non-management employees, S&P would be most relevant.

Using the competence tool allows employees to clearly understand the behaviours that organisations particularly value and require, in order to achieve both their business and personal objectives.

In addition to individual use, the competence tool can also be used for an organisation as a training-needs analysis tool, offering an effective way to identify gaps between the skills your business needs and those of your employees. By gathering information, you can identify areas where your employees could improve their performance. This is invaluable for ensuring that money is spent on training that will help your business to achieve its objectives, evaluate who you want to train and how best to reach them.

In order to ensure parity with needs of organisational roles, the Steering Group developed a project categorisation chart. The chart details recommended training level requirements for the ECI based on a set of differing criteria. One or more category should normally apply to meet the need for training at that level. The following chart was developed as a "guide" for industry & individuals to the skills levels used in the ECI Competence Framework, accepting the International Project Management Association (IPMA) levels as relevant representation of the ECI member body.

The IPMA is the global standard to which many project based organisations align their competencies, and project management structure and terminology to.

## LINKING THE COMPETENCE TOOL TO STAFF DEVELOPMENT

	IPMA Level A	IPMA Level B	IPMA Level C	IPMA Level D
Experience	<b>&gt;10 Yrs</b> (min 5yrs portfolio mgt, programme mgt or multi-project mgt; of which 3 yrs in responsible leadership function)	<b>5 to 10 Yrs</b> (min 3 yrs in responsible leadership functions of complex projects)	<b>Up to 5 Yrs</b> (min 3 yrs. Currently responsible for leadership functions of projects with limited complexity)	<b>0 Yrs</b> (advantage if candidate has applied project management knowledge to some extent already)
Team size	>100	20 to 100	<20	n/a
Project Type	Multiple/ multi-centre /complex	EPIC	Day rate or Eng only	n/a
Project Timescale / Duration	3 yrs+	1 to 3 yrs	< 1 yr	n/a

## BENEFITS OF USING THE ECI PM COMPETENCE FRAMEWORK

It is very important to ECITB that the needs of ALL associated organisations are considered and delivered. The ECI represents organisations with approximately 80,000 employees in the UK alone and is essential to the infrastructure of major economic sectors, through the design, project management, construction, installation, testing, commissioning, maintenance and decommissioning of plant across sectors, including:-

- Oil and gas (on and offshore)
- Power generation
- Nuclear waste reprocessing
- Steel & Metal
- Processing & manufacturing
- Brewing & Distillation
- Pharmaceuticals production
- Chemical
- Food
- Water
- Environmental
- Cement
- Glass
- Paper
- Petrochemical

Within such a diverse group we can expect that some competencies are considered unique to their own industries; however we have strived to develop a model of a consistent, coherent structure for assessing the generic capabilities of current and prospective project managers - one that fits with, and supports other internal frameworks used by ECITB associated organisations.

The competence tool was developed from the wealth of experience of observable behaviours recognised by our Steering Group. These behaviours had been derived from a variety of application areas and were grouped into discrete competencies including project orientation, project requirements & objectives, scope & deliverables, leadership, assertiveness, negotiation, control & reporting, risk management and ethics.

The competence tool can benefit organisations by the means of a "one-stop shop". Key requirements common to each framework were identified and represented, providing a relevant representation of in-scope companies' needs.

Due to the representation of the five PM competence frameworks, organisations can be confident that, within the competence tool, they can match areas to be measured against with their favoured framework; using individual competencies to understand or evaluate in relation to their existing roles; and using the resulting information to guide them in future development. This learning & development could be in line with personal or organisational needs to ensure organisations are fully developed in line with business requirements.

**Please note:** In presenting this booklet, ECITB is not at this stage making any recommendations regarding learning & development options. This is for information only to be used within existing departmental approaches regarding provision of learning & development to project practitioners.

## HOW TO USE THIS TOOL

*In order to understand the process, it is important to read this section before you continue with this booklet.*

Within this document you will find the ECI Project Management competence framework covering both "Systems & Processes" and "Leadership".

Each framework competence has an area title (identified on the tool as numbered, blue pieces of text) with description/s provided. These titles and descriptions were the result of careful consideration in line with key, realistic, demonstrable project management requirements, separated into leadership and systems & processes aspects. To use the tool correctly, read the title and descriptions carefully, and then consider and record the relevant score (0-4) in relation to your knowledge and experience. The PM Levels of Competence scoring mechanism is provided on page 7. Recordings of scores can be made on the self-assessment summary sheet provided on page 12.

Once scores are recorded, you can compare the results with the framework role recommendations to assess whether you sit within your suggested role level (page 6). Thus allowing identification of areas of strength and comprehension, as well as identifying areas for further development.

### FURTHER DEVELOPMENT

In relation to self-assessment summary sheet results, you can visit the ECITB website at [http://www.ecitb.org.uk/management\\_and\\_professional/](http://www.ecitb.org.uk/management_and_professional/) to assess suitable routes for personal development. The link is for the Management & Professional section of our website and a current list of available courses. This list is updated on a regular basis in line with courses on offer. Please note these are generally available courses, - ad-hoc courses or sponsored company courses may not be shown. ECITB Regional Account Management teams are also available for assistance. The ECITB aims to tie these competencies into its interactive Career Progression Route Map being developed for its website.

### ACKNOWLEDGEMENT

Acknowledgement and thanks is given by the ECITB to the Industry specific members of the Steering Group for their contributions and efforts, which were invaluable in ensuring the needs of all in-scope companies could be met. They included representatives from:

Alstom Power; CB&I UK Ltd; CEL International; Foster Wheeler Energy Ltd; Petrofac; Production Services Network (UK) Ltd (PSN); The Shaw Group; Washington Group.

## THE MECHANICS OF THE ECI PM COMPETENCE FRAMEWORK

In the next 2 sections, you will find information relating to indices for reference and also to provide an understanding of the mechanics of the actual framework.-

### SCORING MECHANISM FOR REFERENCE

In the next few pages, you will find our defined ECI competence framework. For each specified competence unit, there will be 4 sets of scorings which relate to the suggested role and level of competence expected. The suggested roles are:-

<b>Level A -</b>	Project Director
<b>Level B -</b>	Project Manager (complex projects)
<b>Level C -</b>	Project Manager (non-complex projects)/ Senior Engineer
<b>Level D -</b>	Project Engineer/Project Lead *

\* Includes individuals with supervisory/managerial responsibilities within a specific area or, possibly, senior project team members preparing for such responsibilities.

## PROJECT MANAGEMENT LEVELS OF COMPETENCE

A 5 level scoring mechanism (detailed below) was adopted for use to identify the level of competence required by each of the project related roles.

### 0. No knowledge required

#### 1. Knowledge

The ability to recall information and have a basic knowledge of the skill area including key dates, events and major developments.

#### 2. Comprehension / Understanding

The ability to demonstrate an understanding of information and identifying the context surrounding it. The ability to grasp meaning and translate knowledge into a new context using order, grouping skills and predicting sequences.

#### 3. Application

Uses the information, methods, concepts and theories and applies knowledge practically and effectively in the appropriate situation.

#### 4. Strategic Application

Relating knowledge from several areas, and using comparison and discrimination between ideas. Assessing the value of theories, and making choices, based on reasoned argument. Verify value of evidence and recognise subjectivity.



## ENGINEERING CONSTRUCTION INDUSTRY PROJECT MANAGEMENT COMPETENCE FRAMEWORK

SYSTEM & PROCESSES		IPMA Level			
Units of Competence - 25		A	B	C	D
<b>SP 1</b>	<b>PROJECT, PROGRAMME &amp; PORTFOLIO IMPLEMENTATION</b> Process of establishing and continuously improving project, programme and portfolio management in organisations.	4	3	2	0
<b>SP 2</b>	<b>LEGAL</b> Competence to ensure project contractual arrangements are in place and that they meet the requirements of the project and comply with organisational policy and procedures for managing contracts.	4	3	3	0
<b>SP 3</b>	<b>LEGAL</b> Relevant legal duties, rights and processes that should be applied to projects for project professionals. This may apply to national as well as company/client policies & procedures	4	3	2	1
<b>SP 4</b>	<b>PROJECT APPRAISAL</b> Feasibility study process, including the financial and other aspects associated with a development appraisal. Apply the techniques used in value management/value engineering, life cycle/whole life costing and risk assessment, together with a balance sheet analysis	4	3	3	0
<b>SP 5</b>	<b>CONTRACT &amp; PROCUREMENT</b> Option appraisal methods and applying relevant methods for carrying out option appraisal including but not limited to technical options/selection of contractors and sub contractors/ financial options e.t.c., including the selection, assembly and analysis of data.	4	3	3	2
<b>SP 6</b>	<b>CONTRACT &amp; PROCUREMENT</b> Process where the buyer and seller review the contract and work results to ensure that the results match the contract – were goods delivered/on time/correctly invoiced/additional conditions of contract met?	2	3	3	0
<b>SP 7</b>	<b>INTERESTED PARTIES</b> Identify and manage 'Stakeholders' / Clients & Customer – people or groups who are interested in the performance and/or success of the project, or are constrained by the project.	4	3	3	3
<b>SP 8</b>	<b>BUSINESS</b> Maximise company profit (through cost-effective designs, improvements to the contract, and recognition of additional scope or new business opportunities).	4	3	3	3
<b>SP 9</b>	<b>SCOPE &amp; DELIVERABLES</b> Identification, definition and agreement of the project to meet the needs and expectations of interested parties, especially those of the customers and users	4	3	3	2
<b>SP 10</b>	<b>SCOPE &amp; DELIVERABLES</b> Competence to define project's defined scope; what constraints and assumptions exist and do not exist; how deliverables will be accepted by the customer, highlight milestones and high-level work breakdown structure.	4	3	3	2
<b>SP 11</b>	<b>RISK &amp; OPPORTUNITY</b> Nature of risk and, in particular, of the risks associated with your area of business/practice, taking into account all relevant factors. Understanding the application of the various methods and techniques used to measure/control & mitigate risks; assessing their effectiveness and outcomes to consider future evaluations. Recording relevant information in the Risk Register.	4	3	3	3
<b>SP 12</b>	<b>CHANGE MANAGEMENT</b> Maintaining control of the project by preventing scope change requests from overwhelming the project and ensuring they are properly handled. Management of change control process to assist in variations to project specification or contract terms with suppliers or customers, monitored against original project goals and objectives and recognising how these will impact upon the project (positively or negatively).	4	3	3	2
<b>SP 13</b>	<b>INFORMATION &amp; DOCUMENTATION</b> Competence to provide the basis for an achievable and successful programme or project, which can frequently be characterised by uncertainty. Focus should be on developing the project charter and preparing the Project Management Plan to aid success.	3	3	3	0



## ENGINEERING CONSTRUCTION INDUSTRY PROJECT MANAGEMENT COMPETENCE FRAMEWORK

SYSTEM & PROCESSES		IPMA Level			
Units of Competence - 25		A	B	C	D
<b>S P 14</b>	<b>INFORMATION &amp; DOCUMENTATION</b> Utilise IT in the execution of project control functions; collection and processing of commercial and technical data, reporting control project status and predicting future project status.	4	3	3	3
<b>S P 15</b>	<b>INFORMATION &amp; DOCUMENTATION</b> Principles and practice of insurance in relation to your area of practice. Applying knowledge and/or be involved with the insurance of related matters.	2	1	1	0
<b>S P 16</b>	<b>CONTROL &amp; REPORTING</b> Project control activities are fully auditable, final financial statements completed, claims settled and data recovery completed to ensure everything carried out satisfactorily.	4	3	3	3
<b>S P 17</b>	<b>CONTROL &amp; REPORTING</b> Use of principles of monitoring projects; including planning techniques such as Gantt Charts. Knowledge and understanding of the various types of schedules commonly used on projects and assess, interpret and report on the control of projects.	3	3	3	3
<b>S P 18</b>	<b>CONTROL &amp; REPORTING</b> Project Management Plan used to best effect in order to monitor, control and report on project progress; demonstrating placing the appropriate procedures in place to control the scheduling and progress measurement aspects and the implications to the project	3	3	3	2
<b>S P 19</b>	<b>COST &amp; FINANCIAL MANAGEMENT</b> Project cost control activities that include the operation of project control systems, the collection of data and the preparation of specific cost reports. Execution of the activities requires that the relevant systems are in place and operational.	4	3	3	2
<b>S P 20</b>	<b>COST &amp; FINANCE</b> Competence to establish the project control budgets and specify the resources required to achieve the defined objectives; including the development and application of estimates to meet the budgetary areas.	3	3	2	2
<b>S P 21</b>	<b>FINANCIAL MANAGEMENT</b> Competence to forecast the use of project financial resources; including establishing the current project financial status, assessing potential future costs including changes, commitments yet to be made, retentions, risks and post completion liabilities and applying approved techniques to estimate the project financial out turn. Financial Management skills using tools such as profit & loss, cash flow and exchange rate mechanisms.	4	3	3	1
<b>S P 22</b>	<b>HEALTH, SECURITY, SAFETY &amp; ENVIRONMENT</b> Set up systems to ensure organisation behaves appropriately in the context of HSS&E during planning phase of project, execution and during the delivered project's life-cycle and decommissions and disposal in order to enforce and maintain highest possible standards of safety management.	4	3	3	2
<b>S P 23</b>	<b>TIME &amp; PROJECT PHASES</b> Activity planning; sequencing and ordering completion of activities and milestones planned throughout the project; using key mechanisms for creating order within the project using hierarchical structures to ensure nothing is omitted from the project. Understanding of clients' (& gate) processes in terms of project milestones and deliverables.	4	3	3	3
<b>S P 24</b>	<b>CONFLICT MANAGEMENT</b> Techniques for conflict avoidance, conflict management and dispute resolution procedures; in relation to leadership procedures and client management, including for example adjudication and arbitration.	4	3	2	0
<b>S P 25</b>	<b>CLOSE-OUT</b> Shut the project down PROPERLY – creating necessary documentation and archives; ensuring all finances closed-out; capturing lessons learned; ensuring contract closed and updating all organisational process assets.	4	3	3	3

<b>LEADERSHIP</b>		<b>IPMA Level</b>			
<b>Units of Competence - 33</b>		<b>A</b>	<b>B</b>	<b>C</b>	<b>D</b>
<b>L1</b>	<b>LEADERSHIP</b> Promote and protect planned work and those who carry it out; concerned with championing, protecting and supporting a project, and those involved in its delivery, from internal or external threats to the project proceeding.	4	4	4	0
<b>L2</b>	<b>LEADERSHIP</b> Define roles and responsibilities within projects to address transient and unique nature of projects, which are aligned to the business processes; to ensure clear accountability assigned.	4	4	4	1
<b>L3</b>	<b>LEADERSHIP</b> Problem resolution as problems arise using negotiation and conflict management skills when required.	3	3	3	3
<b>L4</b>	<b>LEADERSHIP</b> Make the best use of a team and its members so that they can achieve the organisation's objectives; making clear why there is a need for monitoring and assessing the performance of a project team and its members against clear, agreed criteria, taking into account organisational constraints and personal circumstances; and encouraging individuals to evaluate their own performance wherever possible.	4	3	3	1
<b>L5</b>	<b>LEADERSHIP</b> Work effectively and maintain respect across all disciplines, providing inspiration by giving direction and vision and consistently leading by example.	4	4	4	1
<b>L6</b>	<b>LEADERSHIP</b> Operate effectively outside comfort zone; recovering from setbacks with a positive approach.	3	3	3	1
<b>L7</b>	<b>LEADERSHIP</b> Manage and facilitate multi-disciplined/shared resource teams, whether integral or dispersed.	4	3	3	0
<b>L8</b>	<b>ENGAGEMENT</b> Principles, behaviour and dynamics of working in a team and practical application of working as a team member and team working skills.	3	3	3	0
<b>L9</b>	<b>ASSERTIVENESS</b> State views persuasively and authoritatively, help ensure effective communication with others, ensuring the final result is for the benefit of the project.	4	3	3	1
<b>L10</b>	<b>CREATIVITY</b> Think and act in original and imaginative ways, exploiting the creativity of individuals and the collective creativity of the project team to benefit the project. Focussing analytically on the strategic aim of the project, but defining individual detail required for lower level elements of the project in order to aid, improve or solve problems, using conceptual skills to identify patterns or relationships not obviously related.	4	3	3	3
<b>L11</b>	<b>NEGOTIATION</b> Use a range of negotiation styles to ensure the successful conclusion of the project and satisfy the needs of the client.	4	3	3	3
<b>L12</b>	<b>ETHICS</b> Observe and apply professional ethics and values in the execution of project activities; to contribute to the maintenance of the integrity of the organisation and its standing with its customers, suppliers and business associates.	4	3	3	3
<b>L13</b>	<b>VALUES APPRECIATION</b> Contribute to effective working relationships within the project team and with colleagues within your own and other organisations relevant to the implementation of the project.	4	3	3	1
<b>L14</b>	<b>INTERESTED PARTIES</b> Identify and evaluate appropriate options that provide solutions to satisfy the overall objectives for projects; considered in the light of the defined project objectives and their suitability is tested against the stakeholders' aims and objectives.	4	3	3	0

LEADERSHIP		IPMA Level			
Units of Competence - 33		A	B	C	D
L15	<b>INTERESTED PARTIES</b> Manage projects that contribute to the objectives of the sponsoring organisation; project sponsors may be internal or external to your organisation; to manage projects with strategic implications and manage and motivate a team using knowledge and understanding of the characteristics and behaviour of a leader with application of your role as a leader; providing direction and motivation of others in their role or task to fulfil the project's objectives; underpinning knowledge and understanding of idea generating techniques, communication techniques and principles of motivation; making key decisions where required using knowledge contributions; maintaining communication with stakeholders as and when required in order to maintain good relationships and assisting in the collection and flow of information which may affect the running of the project, building up trust and maintaining confidentiality.	4	4	4	1
L16	<b>PROJECT ORIENTATION</b> Develop the overall technical, commercial and operational objectives for projects; establishing the business needs and stakeholders' aims and objectives for the project.	4	4	1	0
L17	<b>PROJECT REQUIREMENTS &amp; OBJECTIVES</b> Prepare & present a business case for a proposed project as a strategic justification for undertaking the project.	4	3	3	0
L18	<b>PROJECT REQUIREMENTS &amp; OBJECTIVES</b> Define and agree a project brief that satisfies the established objectives; as a strategic proposal for authorisation to undertake a project to meet the stakeholders' business objectives and define the key deliverables. Ability to develop a strong bond with clients and client team seeking opportunities for growth and commercial advantage to the organisation.	4	3	3	0
L19	<b>SCOPE &amp; DELIVERABLES</b> Estimate and specify the resources required to achieve the defined project objectives. Ensure requirements of the project management team and the provision of support for the team are met; this may comprise people from within and outside the project manager's organisation and it is the group of key individuals that must collaborate effectively for the project objectives to be achieved.	4	3	3	1
L20	<b>CONTRACT &amp; PROCUREMENT</b> Identify sources and recommend the means of procuring resources for the project schedule; underpinning knowledge and understanding of general principles and processes of procurement, legislative and regulatory frameworks, analysis and evaluation techniques, specifications, degree of required detail and formats used, communication and presentation skills. Recommend contractual arrangements using skills to obtain best value for money. Process of formalising and, once agreed, managing the said contract.	2	2	2	1
L21	<b>TIME &amp; PROJECT PHASES</b> Complete detailed schedule for the project; underpinning knowledge and understanding of general principles and processes of developing project programmes and schedules, legislative and regulatory frameworks, specifications, degree of detail and formats, understanding of relevant software and communication and presentation skills.	2	2	2	1
L22	<b>RISK &amp; OPPORTUNITY</b> Identify risk factors; evaluate options for minimising them across the whole project environment, and to ensure that those with operational responsibilities implement appropriate measures. Risk management should include not only Health, Safety and environmental factors but also generic project risk such as technical, operational, financial, commercial and domino effect.	4	3	3	1
L23	<b>PROJECT STRUCTURES</b> Create Work Breakdown Structure (WBS), in order to facilitate and check the development and progress of the schedule for a project; in a way that a project may be divided by level into discrete groups for programming or scheduling, cost planning and control purposes.	4	3	3	1
L24	<b>SYSTEMS, PRODUCTS &amp; TECHNOLOGY</b> Ensure appropriate systems and procedures are in place that are necessary for the project to be executed in accordance with regulatory requirements and that provide for appropriate action to be taken in the event of an unidentified contravention.	4	3	3	1

LEADERSHIP		IPMA Level			
Units of Competence - 33		A	B	C	D
L25	<b>QUALITY MANAGEMENT</b> Commitment to the use and control of quality management, at all stages of the project's implementation, requiring the responsibilities to be defined and delegated, and the monitoring and reporting systems to be in place to produce deliverable to required quality.	3	3	3	3
L26	<b>BUSINESS</b> Manage and facilitate hard-money exposure with success, running the project like a business and constantly seeking profitability with a focus on the bottom line.	4	3	3	3
L27	<b>HEALTH, SECURITY, SAFETY &amp; ENVIRONMENT</b> Help ensure the organisation behaves appropriately in the context of HSS&E during planning phase of project, execution and during the delivered project's life-cycle and decommissions and disposal in order to enforce and maintain highest possible standards of safety management.	4	3	3	3
L28	<b>CONTROL &amp; REPORTING</b> Review the progress of projects and the effectiveness of the processes being applied by the project manager; appropriate procedures being applied to the co-ordination and delivery of the project outputs relating to the performance, regulatory, financial control, quality assurance, project schedule & budget and hand-over aspects.	4	3	3	1
L29	<b>CONTROL &amp; REPORTING</b> Review and monitor the control systems and procedures necessary to ensure satisfactory financial outcomes to projects; appropriate control procedures are in place to control the financial aspects including income & expenditure and implications to the project.	4	3	3	1
L30	<b>INFORMATION &amp; DOCUMENTATION</b> Analyse and evaluate information provided by others on the project performance, and to initiate action to implement improvements in the processes and practice of managing projects, based on the findings; an on-going process with lessons learned being implemented, wherever possible, throughout the life of the project, and the application of lessons learned to future projects.	4	3	3	1
L31	<b>PERSONAL DEVELOPMENT</b> Continuing and enhancing personal development as appropriate in relation to relevant competencies.	3	3	3	3
L32	<b>CLOSE-OUT</b> Manage the project closure procedures and handover responsibilities for the project to the operational authority or sponsor, or to parties who are to progress the project to a subsequent phase; signifying the successful completion of the project or a phase of the project and that the contractual commitments have been met and accepted by the appropriate authorities.	3	3	3	1
L33	<b>CLOSE-OUT</b> Ensure that everything has been completed satisfactorily and meets the specifications, in order for the project to be commissioned or handed over to the sponsoring organisation or operating authority.	4	3	3	1

# PROJECT MANAGEMENT COMPETENCE SELF-ASSESSMENT SHEET

## Self-Assessment Summary Sheet – ECI PM Competencies

Name:

Date:

System & Processes			Leadership		
Code	Name	Rating	Code	Name	Rating
SP1	Project, Programme & Portfolio Implementation		L1	Leadership	
SP2	Legal		L2	Leadership - 2	
SP3	Legal - 2		L3	Leadership - 3	
SP4	Project Appraisal		L4	Leadership - 4	
SP5	Contract & Procurement		L5	Leadership - 5	
SP6	Contract & Procurement -2		L6	Leadership - 6	
SP7	Interested Parties		L7	Leadership - 7	
SP8	Business		L8	Engagement	
SP9	Scope & Deliverables		L9	Assertiveness	
SP10	Scope & Deliverables - 2		L10	Creativity	
SP11	Risk & Opportunity		L11	Negotiation	
SP12	Change Management		L12	Ethics	
SP13	Information & Documentation		L13	Values Appreciation	
SP14	Information & Documentation - 2		L14	Interested Parties	
SP15	Information & Documentation - 3		L15	Interested Parties -2	
SP16	Control & Reporting		L16	Project Orientation	
SP17	Control & Reporting -2		L17	Project Requirements & Objectives	
SP18	Control & Reporting -3		L18	Project Requirements & Objectives -2	
SP19	Cost & Financial Management		L19	Scope & Deliverables	
SP20	Cost & Finance		L20	Contract & Procurement	
SP21	Financial Management		L21	Time & Project Phases	
SP22	Health, Security, Safety & Environment		L22	Risk & Opportunity	
SP23	Time & Project Phases		L23	Project Structures	
SP24	Conflict Management		L24	Systems, Products & Technology	
SP25	Close-Out		L25	Quality Management	
			L26	Business	
			L27	Health, Security, Safety & Environment	
			L28	Control & Reporting	
			L29	Control & Reporting -2	
			L30	Information & Documentation	
			L31	Personal Development	
			L32	Close-out	
			L33	Close-Out -2	



**Engineering Construction Industry Training Board**

Blue Court, Church Lane, Kings Langley, WD4 8JP  
+44 (0) 01923 260000

**[www.ecitb.org.uk](http://www.ecitb.org.uk)**