



Mel King Institute
for community building

PROJECT MANAGER CORE COMPETANCIES TRACKER



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The Tracker tool was designed to support the growth and development of non-profit real estate project managers. The tool can be adapted to suit needs of various project managers, as job titles and the division of work will differ for each organization. It can be used with a supervisor/supervisee relationship or as an individual project manager self-assessment.

This tracker is useful for assessing a project manager's skill development, identifying gaps and planning how to fill those gaps. It is not meant as an evaluation. The goal of the tracker is to end with a list of 3-5 action steps a Project Manager might prioritize over the year to fill gaps and advance professionally. These action steps may be courses, internal leadership opportunities, shadowing an expert, mentoring by someone in-house who has the skill set the Project Manager wants to acquire, etc.

For example, if the tracker finds strong financial skills and internal project management skills but less strength/experience in construction basics and presentations, the project manager and her/his supervisor might list among the priorities for the coming year taking an online or in-person design basics class, finding practice opportunities for public presentations and attending meetings led by expert presenters who can be role models.



GOALS OF THE TRACKER

The overall goal is to support the growth of capacity among project managers.

01 SIMPLICITY

Create a simple tool that can be used to show an agreed-upon typical trajectory of skill acquisition from Basic to Emerging to Proficient.

02 SHOW THE PATH

Structure the tool to assess a project manager's current skills, place them on the trajectory and encourage career development by mapping the path towards growth.

03 FLEXIBILITY

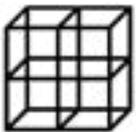
Recognize individuals and workplaces are unique, thus make the tool non-threatening and adaptable. Leave the tool in an easily edited format (Word document).

SUGGESTIONS FOR USING THE TRACKING TOOL



TIME: 1 HOUR

The preparation, completing the Tracking Tool, and discussing the next steps will take about one hour. Remember: This is an adaptable tool. The tracker can be used yearly, quarterly, or even as a one-time assessment. The Tracker is not meant to replace evaluation or workplans, but can be used with those tools.



PREPARATION

Before using the tracker, each organization or individual should “calibrate” the tool to their own circumstances, by linking how the progression might tie to job titles. Roughly, we expect Basic would be a Junior Project Manager or Development Associate, Emerging would be a Project Manager and Proficient would be a Senior Project Manager toward Department head.

The chart at the end of this overview may be helpful. Any categorization needs to be modified to the organization’s circumstances as well as thought toward a project manager’s overall career development.

Organizations differ in terms of skills which are in-house or contracted out— property management, asset management, community engagement, etc. Some adaptation of the tracker may be necessary. Also, an individual project manager may have personal skill development goals that should also be considered. For example, even if an organization hires outside staff for construction oversight, a junior project manager may want a deeper understanding of the process, cost drivers and construction methods.



CONDUCTING THE ASSESSMENT

- 1) Self - start the self-assessment and review for your next steps
- 2) Supervisor/supervisee - we recommend that the project manager assess themselves initially and then review jointly with the supervisor.
- 3) Team - each staff member should complete the Tracking Tool (including the director) and then review it as a team.

In each subcategory, mark where the Project Manager rates between 1 to 5 in Section 1 and falls on the Basic, Emerging, Proficient Scale in Section 2. For each broad category in skills (Design/Construction, Financial and Process/Legal), mark an overall assessment.

The tracker is divided into two formats related to two sets of skills:

- 1) Soft Skills and
- 2) Technical/Knowledge-Based Skills.

Soft skills are typically not solely dependent on knowledge acquisition, and thus separate from more technical/knowledge-based skills in Section Two.

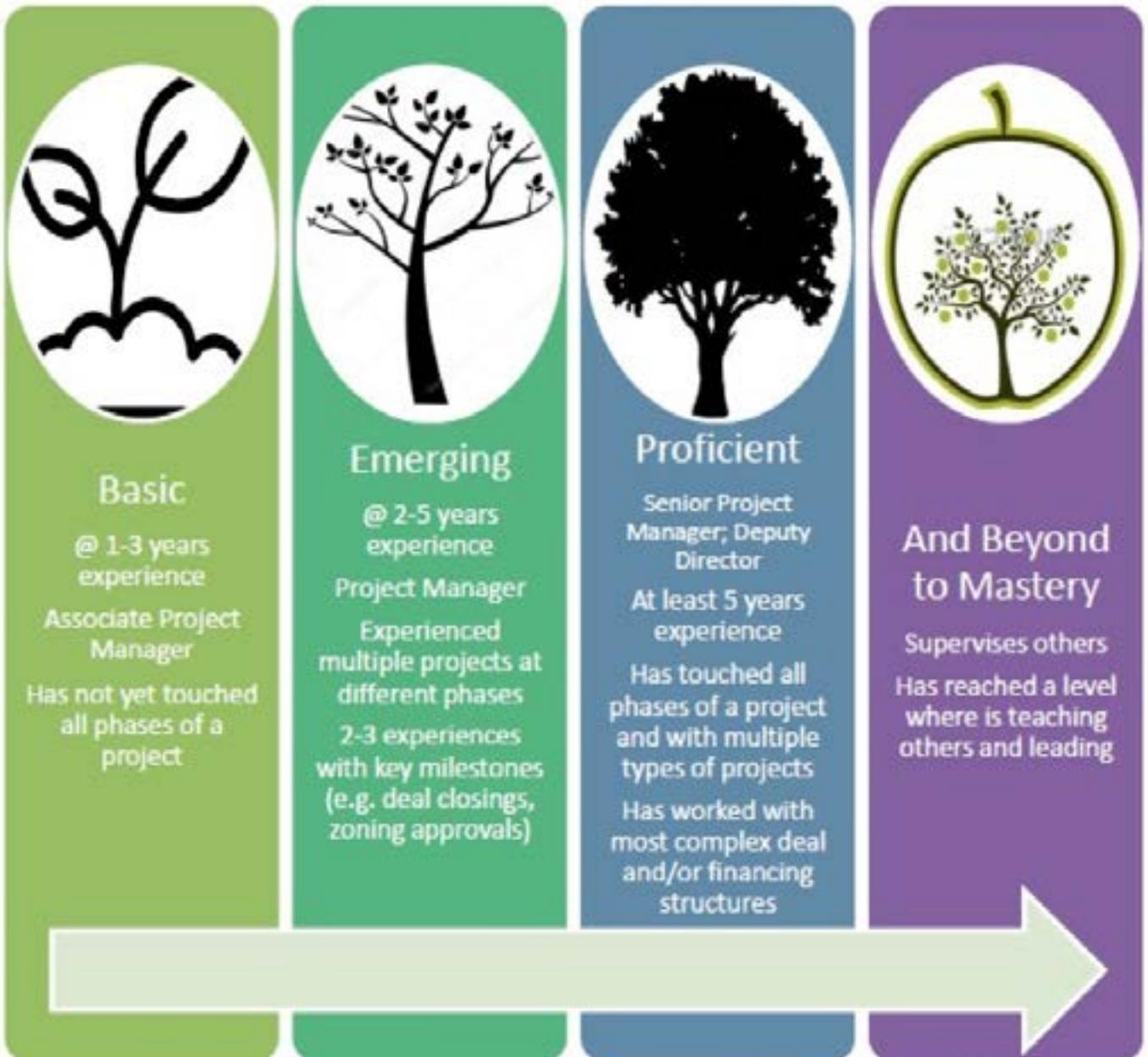
The final step should be determining a list of priorities or action steps for the coming year, to move higher on the scale within the Foundational, Emerging or Proficient categories or from one category to another.



IDENTIFYING NEXT STEPS

The last piece of the toolkit is for the individual or team to develop a list of 3-5 next steps on the form provided to move the staff member higher on the scale within Foundational, Emerging or Proficient. Next steps could include workshops, leadership opportunities, mentoring, peer learning and support. The final page of this document is a suggested template for identifying those next steps.

PROFILE OF TYPICAL TRAJECTORY



SECTION ONE COMPETENCIES: SOFT SKILLS, PROJECT MANAGEMENT, PROCESS

(Please rank 1 to 5, with 5 being most proficient)

Communications and Project Management.

Delivers compelling public presentations to broad & diverse audiences and articulates the development project in lay terms (from resident groups to small groups to broadest range of key stakeholders)

Effective written communication tied to format (e.g. email, memo, public information)

Formulates a communication plan and establishes processes for communication and decision making internally and externally

Thoughtfully facilitates community meetings & conversations: actively listens for concerns & impacts, both positive & negative, manages difficult meetings

Has a relational understanding of community (may be based on experience, identity, second language ability)

Skillful Negotiator (general negotiation skills rather than technical expertise)

Effective time management; meets or exceed all deadlines

Shares information appropriately, internally and externally

Makes sound judgment calls getting right level of information and seeking input when needed

Keeps “eye on the right ball”, can discern critical path and prioritize steps

SECTION ONE COMPETENCIES: SOFT SKILLS, PROJECT MANAGEMENT, PROCESS

Fosters teamwork (some examples of skills)

Choosing a team that can work well together

Knows who to engage and when, how

Facilitates time-sensitive meetings so opinions are heard,
decisions made, project stays on track

Fosters collaboration through active listening and inquiry

Keeps team informed of changes, progress and problems

Manages both up and down within organization

Organizes and includes team members at appropriate points in
the development process

Keeps team focused to timeline and budget, aware of
implications to both of decisions

SECTION ONE COMPETENCIES: SOFT SKILLS, PROJECT MANAGEMENT, PROCESS

Demonstrates Leadership Skills, such as

Is able to maintain focus and drive during the entire length of the process

Balances big picture and detail

Manages stress productively; maintains calm during crises

Understands own strengths and weaknesses

Seeks help from others to best inform decisions

Keeps project connected to mission, financial goals

Follows Steps of Procedural Project Management

Understands and completes documentation needed at each development stage

Keeps regular and clear meeting minutes including assignment of tasks

Manages a project timeline, regularly updates it

Tracks budgets, costs and payment of vendors

SECTION TWO COMPETENCIES: TECHNICAL SKILLS

CONSTRUCTION DESIGN

Initial Feasibility

Basic - Able to procure/oversee early-stage due diligence (Phase I, engineering)

Initial Site Evaluation

Basic - Interprets early-stage site evaluations (Phase I and 2)

Emerging - Strategizes on approaches to address site evaluation issues

Design and Construction Knowledge

Basic - Understands design basics and links to program goals (target user, location, building uses, etc.)

Emerging - Knowledge of advanced design, and critical decisions regarding site, floor plans, structure, systems, and finishes

Proficient - Facile with all engineering, design and construction technical components, terminology, interface, and decision-making path

Construction Cost Estimating

Basic - Understands basics of the key drivers of construction costs

Emerging - Strong understanding of value management; identifies issues and trade-offs early

Proficient - Informed guiding of decision-making throughout process re: drivers of cost and trade-offs in design

Design Oversight

Basic - Basic ability to read design documents, understand key milestones; Can manage team members (incl. property management) to compile design comments

Emerging - Able to double-check plans and specs to align with program goals, past decisions

SECTION TWO COMPETENCIES: TECHNICAL SKILLS

CONSTRUCTION DESIGN contd...

Construction Team Procurement

Basic - Basic ability to write design and construction services RFPs

Emerging - Strategizes to create / procure effective design, and construction management team; writes complex RFPs and oversees vetting and selection

Proficient - Adept at attracting best quality/value project team, matching organizational and project needs to team's capacity

Construction Team Management

Basic - Can negotiate simple professional services contracts or letter agreements

Emerging - Negotiates design and construction business arrangements balancing risks, requirements, and relationships

Proficient - High degree of facility in managing construction team including when facing difficulties

Construction Oversight

Basic - Contributes at job meeting, incl take meeting notes or responsible for owner item follow-up as needed

Emerging - Informed input during construction process and Identifies issues which may delay process

Proficient - Fully understands construction process, spots critical path issues; avoids and/or mitigates delays

CONSTRUCTION DESIGN OVERALL

SECTION TWO COMPETENCIES: TECHNICAL SKILLS

FINANCIAL

Real Estate Finance

Basic - Understands basic concepts of real estate finance

Emerging - Knows the long-term implications for asset management of financing decisions.

Can explain real estate finance and underwriting assumptions as needed to team, funders

Proficient - Understands complex deal structuring, suggests creative strategies to leverage sources, deploy funds, manage gaps

Affordable Housing Finance

Basic - Understands basic concepts of affordable housing finance (hard vs. soft debt, equity vs. loan)

Knows requirements of private and public financing programs (both capital and operating) and how layer together.

Emerging - Understands implications of financing sources for project timeline, team, etc.

Understands assumptions used to estimate sources, uses and operating costs

Proficient - Negotiates with lenders and investors regarding terms; Can adapt project in face of setbacks

Commercial Real Estate

Basic - Understands basic concepts of commercial real estate finance (leasing, tenant improvements)

Knows requirements of private and public financing programs (both capital and operating) and how layer together for commercial/non-housing projects

Emerging - Understands implications of financing sources for project timeline, team, etc.

Understands assumptions used to estimate sources, uses, leasing, tenant improvement allowances and operating costs

Proficient - Negotiates with lenders and investors regarding terms; Can adapt project in face of setbacks

SECTION TWO COMPETENCIES: TECHNICAL SKILLS

FINANCIAL contd...

Public Financing

Basic - Understands the financing application process and timing for public financing programs

Emerging - Building relationships with funders

Proficient - Has built solid and trusting relationships with key funders

Project Cost Budgeting and Tracking

Basic - Understands basic concepts of accounting, cash flow needs and budget tracking

Emerging - Advanced awareness of accounting, cash flow needs and budget tracking; understands cost certification, implications of decision-making for cost certification

Proficient - Able to predict issues in cash flow, accounting and cost certification over the life of the project; able to adapt the project & address issues caused by delays, unanticipated events in terms of effect on cash flow, certification, etc.

Construction Requisitions

Basic - Can compile requisitions from invoice and requisition requirements and process, follow up on process

FINANCIAL OVERALL

SECTION TWO COMPETENCIES: TECHNICAL SKILLS

PROCESS, APPROVALS, LEGAL

Problem-Solving Throughout Development Process

Basic - Familiar with stages of real estate development from site assessment to pre-development to construction to occupancy

Emerging - Can strategize around key steps in process – acquisition, community process, political support

Proficient - Strategizes and negotiates effectively around project choices and trade-offs

Project Life-Cycle Feasibility

Basic - Understands key components of site assessment and deal feasibility in development and operations

Emerging - Manages an affective hand-off to property management and asset management

Permits and Approvals

Basic - Understands local zoning & land use requirements and restrictions;
Understands other regulatory processes and approvals

Emerging - Develops list, tracks and keeps on course all approvals

Proficient - Anticipates approval critical path; Possesses strategic ability and relationships, can influence key stakeholders

Closing & Legal: Negotiating Contracts and Agreements

Basic - Basic understanding of legal terminology, legal structuring and legal documents
Reads key closing documents

Emerging - Fluent with legal terminology and contract components; reads all closing documents and comments appropriately

Proficient - Skilled in negotiating contract and partnership terms; Understands impacts of partnership agreements and what points to negotiate

SECTION TWO COMPETENCIES: TECHNICAL SKILLS

PROCESS, APPROVALS, LEGAL contd...

Closing & Legal: Managing the Process

Basic - Tracks team comments on documents, identifies/corrects factual errors; due diligence items like insurance

Emerging - Can manage closing checklist and understand how to manage the personalities involved

Proficient - Anticipates closing issues and critical path, can efficiently drive closing from start to finish

**PROCESS
OVERALL**

NEXT STEPS

Name of Organizer/Community Engagement Practitioner:

Name of Supervisor (if applicable):

Date:

Based on the review in the Tracker, we identify the following top three goals for the coming year.

- I.
- 2.
- 3.

We have identified the following suggestions for concrete ways to attain those goals (e.g., workshops, courses, internal leadership opportunities, mentoring/coaching by someone (external or internal) who has the desired skill set, peer learning/support, action/reflection tools, site visit to other organizations, etc.)

Date to review progress on goals:

*Remember to consult the **Training and Resource Catalog** on the Mel King Institute website for possible trainings resources.*