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RESEARCH REPORT

COMPARISON AND ANALYSIS OF
PROVINCIAL BUILDER AND
RENOVATOR INDUSTRY
PROGRAMS



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Final Report

Comparison and Analysis of Provincial Builder and Renovator Industry Programs

June 1, 2004

Submitted to:

Canada Mortgage and Housing Corporation
700 Montreal Road
Ottawa, Ontario

Darrel Smith
Senior Researcher

Submitted by:

Sun Ridge Group
2308 Arlington Avenue
Saskatoon, Saskatchewan

Keith Hanson

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Steering/Review Committee

Paul Gravelle
Canadian Home Builders' Association
Ottawa, Ontario

Russell Walsh
Superior Cabinets
Saskatoon, Saskatchewan

Darrel Smith
CMHC
Ottawa, Ontario

John Bell
Homeowner Protection Office
Vancouver, British Columbia

M.J. Whitemarsh
CHBA-BC
Vancouver, British Columbia

Robert Gagnon
APCHQ
Anjou, Quebec

Team Members

Linden Holmen
Holmen Enterprises Ltd.
Victoria, British Columbia

Gail Lawlor
Energy Matters
Pickering, Ontario

Mary Kenny
Atlantic Home Building & Renovation
Sector Council
East Dover, Nova Scotia

Brian Marshall
REIC
Toronto, Ontario

Greg Lampert
Greg Lampert Economic Consultant Inc.
Toronto, Ontario

Hugh Ward
Forum Habitation
Longueuil, Quebec

Valerie Sutton
Sun Ridge Group
Saskatoon, Saskatchewan

EXECUTIVE SUMMARY

The purpose of this research project was to investigate the current situation of the provincial builder and renovator training/certification programs in Canada and in other countries, and to conduct a comparative analysis of the programs.

Training/certification programs for builders and renovators have been developed for most regions/provinces in Canada. Each believes, to some degree, that they are unique and thus require regional customization. It is not known how these programs compare to one another and to the National Occupational Analysis for New Home Builder and Residential Renovation Contractor (OA). There is a need to clearly identify the underlying rationale for why and how training programs, delivery, and management systems were developed and implemented.

The objectives of this study were:

1. To analyze the existing programs and compare the individual elements of the required training courses using the tasks and subtasks of the existing National Occupational Analysis for New Home Builder and Residential Renovation Contractor as the reference point.
2. To identify training gaps in the awareness, knowledge acquisition and skill development elements of the courses through comparison to the awareness, knowledge acquisition and skill development elements of the Occupational Analysis.
3. To identify the operational differences and commonalities of the training/certification programs across the country by comparing the delivery processes and management of the programs.
4. To compare training/certification programs in other countries, which have implemented similar industry programs, with those in Canada.
5. To propose a harmonized pan-Canadian model for builders and renovators.

The research involved a series of steps: collection of course materials for analysis; development of a standard course analysis matrix; analysis of course materials; assembly and summary of program requirements/delivery process information; development of a pan-Canadian model; validation of the pan-Canadian model in British Columbia; and presentation of the results at the National Education and Training Advisory Committee.

The analysis indicated that the new home builder/renovator courses in all the regions/provinces in the study covered most of the tasks and subtasks in the National Occupational Analysis for New Home Builder and Residential Renovation Contractor. The analysis also indicated that the new home builder/renovator

courses in all of the Canadian regions/provinces in this study are similar and that they are aligned with the National OA. The main difference is the length of time that is devoted to a particular topic.

The current operations of new home builder/renovator certification programs in Canada varies from region to region; however, in terms of courses and required criteria, there are common characteristics.

There were six courses common throughout the regions: Financial Management, Sales and Marketing, Construction Law, Project Management, Building Code, and Business Management.

In the United States, there are several designations offered by the National Association of Home Builders. For the purposes of this report, four designations were summarized. In Australia, there are differing programs in several states. For the purposes of this report, a representative program was summarized: Registered Building Practitioners in Victoria. Upon examination, it was determined that the training courses offered in the U.S. and Australia align closely with those offered in Canada.

Analysis of Canadian new home builder/renovator programs in Canada and programs in the United States, and to some extent Australia, were used to develop a harmonized pan-Canadian model. This model will present a standard by which individual regional training efforts can better align their courses to the National Occupational Analysis.

A harmonized pan-Canadian model, based on the National Occupational Analysis, would establish a core level of tasks/skills required by the professional homebuilder. Builders and renovators would be able to compare their knowledge level (credentials) with that of other builders and renovators across Canada – on a fair and equitable basis. Regional/provincial programs would have the confidence that their designations are at least as good as they are in any other region/province of Canada.

The proposed designation is the Canadian Graduate Builder or Canadian Graduate Renovator (CGB or CGR), which can be attained by challenging a CGB or a CGR exam. The development of an exam will offer a means of providing greater consistency in educational initiatives throughout the country.

Courses are based on the National OA. Five content areas were identified: Project Management, Human Resources, Financial Management, Marketing and Sales, and Business and Operations.

A Candidate Assessment Review (CAR), which measures knowledge and experience in the five content areas of the business of building (renovating) was proposed in order to allow experienced individuals to challenge the CGB or CGR exam without taking all or some of the regional (provincial) courses. The results would identify candidate competencies and deficiencies, and determine training that must be taken to be eligible to challenge the Canadian Graduate Builder (Renovator) exam.

A focus group and key informant interviews were conducted in Vancouver, British Columbia. As a result, the proposed harmonized pan-Canadian model was evolved and endorsed.

The development of a CGB and a CGR exam would offer a means of providing greater consistency in educational initiatives throughout the country. Regions would be able to determine what additional competencies would bring their curriculum into alignment with the National OA. Provincial associations would also have the ability to assess which of their programs extend beyond the reach of the OA. A certification procedure would result in enhanced transportability of accreditation/certification from region to region. The CGB and the CGR exam may also be used as the basis for the development of college certifications.

A harmonized pan-Canadian model would enable builders and renovators to achieve a consistent national-level standard, which could be seen as prestigious and valuable to promote in show homes, displays and sales literature.

RÉSUMÉ

La recherche avait pour objectif d'examiner la situation actuelle en matière de programme de formation et de certification des constructeurs et des rénovateurs à l'échelon provincial au Canada et dans d'autres pays, et de mener une analyse comparative des programmes.

Des programmes de formation et de certification pour les constructeurs et les rénovateurs ont été mis sur pied dans la plupart des provinces au Canada. Chacun croit, dans une certaine mesure, qu'il est unique, et donc nécessite une adaptation régionale. On ne connaît pas dans quelle mesure ces programmes se comparent les uns aux autres, ni en rapport avec l'analyse professionnelle nationale visant les constructeurs de maisons neuves et les entrepreneurs en rénovation résidentielle (analyse de professions). Il faut déterminer précisément les hypothèses qui ont sous-tendu l'élaboration et la mise en oeuvre des programmes de formation, et de leur application et gestion.

Voici les objectifs de l'étude :

1. Effectuer l'analyse des programmes actuels et comparer les éléments individuels des cours de formation requis à l'aide des tâches et des sous-tâches de l'analyse nationale des professions pour les constructeurs de maisons neuves et les entrepreneurs en rénovation résidentielle comme repère.
2. Repérer les lacunes dans la sensibilisation, l'acquisition de connaissances et les éléments d'élaboration des compétences des cours de formation en les comparant aux éléments correspondants de l'analyse des professions.
3. Déterminer les différences et les similitudes de fonctionnement des programmes de formation et de certification partout au Canada en comparant le processus de mise en oeuvre et de gestion des programmes.
4. Comparer les programmes de formation et de certification des autres pays au sein desquels on a mis en oeuvre des programmes d'industries semblables à celles du Canada.
5. Proposer un modèle d'harmonisation pancanadien pour les constructeurs et les rénovateurs.

Les travaux comportaient une série d'étapes : la collecte du matériel pédagogique aux fins d'analyse; l'élaboration d'une matrice d'analyse normalisée des cours de formation; l'analyse du matériel des cours; la collecte et la rédaction d'un résumé des exigences de programme et des renseignements portant sur le processus de mise en oeuvre; élaboration d'un modèle pancanadien; validation du modèle de la Colombie-Britannique et la présentation des résultats au Comité national consultatif de l'éducation et de la formation.

Les résultats de l'analyse indiquent que les cours de formation à l'intention des constructeurs de maisons neuves et des rénovateurs dans toutes les régions/provinces reprenaient la plupart tâches et sous-tâches de l'analyse professionnelle nationale visant les constructeurs de maisons neuves et les entrepreneurs en rénovation résidentielle. L'analyse a également révélé que tous les cours de formation dans les provinces et régions canadiennes sont semblables et qu'ils concordent avec l'Analyse professionnelle nationale. La différence majeure réside dans le temps réservé pour chacun des sujets.

Le fonctionnement des programmes de formation et de certification visant les constructeurs de maisons neuves et les rénovateurs varie d'une région à l'autre, toutefois, au chapitre des cours et des critères exigibles, certaines caractéristiques sont communes.

On retrouve un tronc commun de six cours dans chacune des régions : gestion financière, ventes et marketing, droit de la construction, gestion de projet, code du bâtiment et direction des affaires.

Aux États-Unis, plusieurs désignations sont offertes par la National Association of Home Builders. Pour les besoins de l'étude dont il est question ici, on présente un résumé de quatre désignations. En Australie, les programmes diffèrent en fonction des États. Pour les besoins du rapport, on a donc résumé un programme représentatif : le Registered Building Practitioners à Victoria. Après étude, on a conclu que les cours de formation offerts tant aux États-Unis qu'en Australie s'alignent sur ceux offerts au Canada.

L'analyse des programmes visant les constructeurs de maisons neuves et les rénovateurs au Canada et aux États-Unis, et dans une certaine mesure ceux de l'Australie, a permis de mettre au point un modèle pancanadien. Ce modèle représentera la norme sur laquelle les efforts de formation individuelle des régions pourront mieux aligner les cours à l'Analyse professionnelle nationale.

Un modèle harmonisé pancanadien, fondé sur l'Analyse professionnelle nationale, permettrait d'établir un noyau de tâches et de compétences requises pour devenir un constructeur de maisons professionnel. Les constructeurs et les rénovateurs seraient en mesure de comparer leur niveau de connaissances (références professionnelles) avec celui d'autres constructeurs et rénovateurs partout au Canada – sur une base juste et équitable. Les gestionnaires des programmes régionaux et provinciaux auraient ainsi la certitude que leurs désignations sont au moins aussi bonnes que celles des autres régions ou provinces au Canada.

La désignation canadienne proposée s'intitule Maître constructeur ou Maître Rénovateur (MC ou MR), laquelle peut être obtenue en réussissant l'examen prévu. L'élaboration d'un examen offrirait un moyen d'atteindre une plus grande uniformité dans les initiatives de formation partout au pays.

Les cours seront fondés sur le l'analyse nationale des professions (AP). Cinq domaines de compétences ont été formulés : gestion de projet, ressources humaines, gestion financière, vente et marketing, affaires et exploitation

Une revue de l'évaluation des candidats (CAR), qui mesure les connaissances et l'expérience dans les cinq domaines du domaine de la construction (rénovation) a été proposée afin de permettre à des personnes de s'inscrire à l'examen de MC ou de MR fondé sur l'expérience sans suivre tous les cours régionaux (provinciaux), ou quelques-uns seulement. Les résultats permettraient de découvrir les compétences et les déficiences, et préciseraient la formation à suivre afin de pouvoir poser sa candidature à l'examen de MC ou de MR.

Un groupe de discussion et des entrevues auprès d'intervenants clés ont été menés à Vancouver, en C.-B. Le modèle harmonisé pancanadien qui en a résulté a été adopté.

L'élaboration de l'examen de MC ou de MR offrirait un moyen d'assurer une plus grande uniformité au sein des initiatives de formation partout au pays. Les régions seraient en mesure de déterminer quelles compétences additionnelles seraient susceptibles de mieux aligner leur programme d'étude avec l'Analyse nationale des professions. Les associations provinciales auraient ainsi la capacité d'évaluer lequel de leurs programmes excède la portée de l'analyse des professions. Une formule de certification engendrerait une plus grande portabilité de l'accréditation/certification d'une région à l'autre. Les examens de MC et de MR pourraient également être employés comme fondement d'un processus de certification dans les collèges.

Un modèle pancanadien harmonisé permettrait aux constructeurs et aux renovateurs d'atteindre une norme de niveau nationale, laquelle pourrait constituer un élément de prestige dans la promotion de maisons modèles, dans les stands et dans les documents de vente.



National Office

Bureau national

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Ottawa ON K1A 0P7
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APPENDICES

1.0 Introduction

Training/certification programs for builders and renovators have been developed for most regions/provinces in Canada. Each region believes, to some degree, that they are unique and thus require regional customization. In some regions, municipal or provincial legislative requirements influence/control program initiatives. Other regions have significant union involvement in the residential industry, which has an effect on how business is conducted. Home warranty providers also impact the requirements of registration/membership in the various warranty programs. It is not known how these training/certification programs compare to one another and to the National Occupational Analysis for New Home Builder and Residential Renovation Contractor (OA). There is a need to clearly identify the underlying rationale for why and how training programs, delivery and management systems were developed and implemented.

The OA, which was developed in 1992, focuses on the skills and knowledge required by the owners of successful building and renovation businesses. It does not deal with emerging technologies, products, designs or new codes and standards.

The purpose of this research project is to investigate the current situation of the provincial builder and renovator training/certification programs in Canada and in other countries, and to conduct a comparative analysis of the programs. Based on the analysis, a harmonized pan-Canadian model was to be designed.

The objectives of the study were:

1. To analyze the existing programs and compare the individual elements of the required training courses using the tasks and subtasks of the existing National Occupational Analysis for New Home Builder and Residential Renovation Contractor as the reference point.
2. To identify training gaps in the awareness, knowledge acquisition and skill development elements of the courses through comparison to the awareness, knowledge acquisition and skill development elements of the Occupational Analysis.
3. To identify the operational differences and commonalities of the training/certification programs across the country by comparing the delivery processes and management of the programs.
4. To compare programs in other countries, which have implemented similar industry programs, with those in Canada.
5. To propose a harmonized pan-Canadian model for builders and renovators.

2.0 Methodology

The research involved a series of steps:

1. Collection of course materials for analysis. The project team obtained course materials from Home Builders' Associations (HBAs) in British Columbia, Saskatchewan, Manitoba, Quebec and the Atlantic Provinces. In Alberta, materials were obtained from the Professional Home Builders Institute of Alberta (PHBIA). Ontario does not currently have new home builder/renovator courses available through the Ontario HBA. In addition, the National Renovators' Business Course, and information on programs in the United States and Australia were obtained.
2. Development of a standard course analysis matrix. The Occupational Analysis for New Home Builder and Residential Renovation Contractor (OA) was divided into five main content areas: Business and Operations, Financial, Human Resources, Marketing and Sales, and Project Management. The sub-blocks, and their corresponding tasks, were then assigned to the appropriate content areas. This allowed for more efficient analysis of the courses, which were generally grouped into these five areas.
3. Analysis of course materials. Since the analyses were conducted using the participants' manuals, rather than the instructors' manuals (which were requested but not provided due to the protective nature of the owners), the accuracy of the evaluations in terms of the level of expertise provided, is uncertain. In addition, there was some difficulty in obtaining course materials. For Alberta, it was necessary to review all of the courses on location. Also, one course was not available because they did not own it.

Courses were distributed to members of the project team and systematically assessed against the OA matrix. This required a matching exercise, i.e., identifying the topics in the OA, identifying the topics in the assigned courses, and identifying where there was a match. The level of expertise presented on the matched topic in the OA by the course was assessed using the following guidelines:

- Awareness: introduction and reference to the topic
- Knowledge: in-depth or lengthy discussion about the topic referenced in the sub-task.
- Skill Development: inclusion of any or all of the following activities:
 - Case study analysis
 - Hands-on use of resource materials
 - Field trips with practical exercises, e.g. site visits
 - Take home exercises

- Work sheets
- In-class engaging activities such as debates or role-playing

The results from each course were then transferred to a master matrix, which was organized according to the original OA. From this matrix, the gaps between the OA and the courses for a region were identified. Also identified were course elements that deal with items not in the OA. One member of the team was responsible for providing interpretation throughout the review process. Also, a general overview of all the course analyses was conducted, gaps were identified, and a re-analysis was done to determine if something was overlooked.

4. Assembly and summary of program requirements/delivery process information. Information on regional training/certification programs was obtained from the Home Builders' Associations. Information about programs in the United States was obtained from the National Association of Home Builders website, and information about programs in Australia was obtained from one of the team members. Comparison of all aspects of the programs including, for example, mandatory vs. voluntary participation, continuing education requirements, courses, examinations, evaluations and course delivery was conducted. The information was summarized in tables, which were then used to compare the various regions. An examination of whether or not the educational programs form part of a broader builder rating program aimed at assisting consumers to identify more qualified builders was also conducted.
5. Development of a pan-Canadian model. Based on the program analyses and the program requirements/delivery process information, a national model was developed.
6. Validation of the proposed harmonized pan-Canadian model in British Columbia through focus groups and key informant interviews under the direction of the CHBA-BC. A focus group discussion was held in Vancouver on March 26, 2004. Following the focus group discussions, key informant interviews were held with builders and renovators from B.C.
7. The results of the research were presented to the National Education and Training Advisory Committee at its Spring Meeting in Ottawa, 2004.

3.0 Results

The detailed course analyses for the regions/provinces are shown in Appendix A.

In the National OA, a task is defined as the distinct activity, that combined with others, makes up the logical and necessary steps the builder or renovator is required to perform to complete a specific assignment within a block or sub-block. A subtask is the smallest division into which it is practical to sub-divide any work activity and, combined with others, fully describes all duties constituting a task.

The courses offered in each region/province and a summary of the course analyses are as follows:

3.1 British Columbia

In British Columbia, there are six mandatory courses for the Registered Housing Professional (RHP) and five for the Registered Renovation Professional (RRP). A Certified Residential Builder must employ an individual that is a RHP, and a Certified Residential Renovator must employ an individual that is a RRP.

The following is a list of the courses that are required for Builders and Renovators:

1. Financial Management (mandatory for Builders and Renovators)
2. Sales and Marketing (mandatory for Builders)
3. Construction Law (mandatory for Builders and Renovators)
4. Project Management (mandatory for Builders and Renovators)
5. Building Technologies for the New Millennium (mandatory for Builders)
6. BC Building Code – Part 9 – An Introduction (mandatory for Builders and Renovators)
7. Sales and Marketing for Renovators (mandatory for Renovators)

The results of the course analysis are summarized in the following table and reflect both the RHP and the RRP. Block A, Business Planning, is covered to some extent in four of the five sub-blocks. Definition of Business Goals is not covered. About half of the subtasks are covered at the skill level.

In Block B, Implementation of the Business Plan, all seven sub-blocks are covered to some extent. The majority of subtasks are covered at the awareness and knowledge levels.

In Block C, Monitoring and Evaluation of the Business Plan, is covered to some extent in three of the five sub-blocks, mostly at the awareness and knowledge levels.

BRITISH COLUMBIA	Sub-Block	Title	% of Tasks Covered	% of Subtasks Covered
BLOCK A: Business Planning	A1	Definition of Business Goals	0	0
	A2	Development of Marketing and Sales Plans	100	100
	A3	Development of a Financial Plan	100	100
	A4	Development of an Operating Plan	50	52
	A5	Development of a Human Resource Plan	100	100
BLOCK B: Implementation of the Business Plan	B1	Business Management	80	81
	B2	Marketing and Sales	100	100
	B3	Financial Management	63	65
	B4	Human Resource Management	50	24
	B5	Project Management	94 (82)*	90 (84)**
	B6	Project Supervision	100	97
	B7	Client Relations	100	100
BLOCK C: Monitoring and Evaluation of the Business Plan	C1	Monitoring & Evaluation of Objectives	0	0
	C2	Monitoring & Evaluation of Marketing & Sales Plans	100	100
	C3	Monitoring & Evaluation of the Financial Plan	100	94
	C4	Monitoring & Evaluation of the Operating Plan	0	0
	C5	Monitoring & Evaluation of Human Resources	67	73

* Percentage of tasks covered in the Registered Renovation Professional program

** Percentage of subtasks covered in the Registered Renovation Professional program

3.2 Alberta

In Alberta, there are nine mandatory courses required for the PHBIA Accredited Master Builder® and five optional courses.

Mandatory:

1. Basic Business Law
2. Building Codes and Standards
3. Business Principles for the Business of Home Building
4. Communication and Negotiation for the Home Builder
5. Estimating and Purchasing
6. Finance and Accounting
7. Moisture Control Technician
8. New Home Marketing
9. Service Excellence

A Choice of five of the following:

1. Blueprint Reading
2. Building Solutions
3. Construction Administration
4. Construction Fundamentals
5. Construction Supervision
6. Land Development
7. National Renovators' Business Course
8. Sales Management

For the PHBIA Accredited Master Renovator®, there are 10 required courses – in addition to the mandatory courses for the Master Builder the National Renovators' Business Course is included, which is discussed on page 19. Also, participants must take one course drawn from any other course from the Master Home Builder Certification or Professional Site Manager Certification, or any two courses from the Certified New Homes Sales Professional Certification.

The results of the course analysis are summarized in the following table. All of the Blocks are covered to the subtask level. Most of the subtasks are covered at the skill development level.

There is no difference in coverage, at the task and subtask levels, between the Accredited Master Builder® and the Accredited Master Renovator®. However, inclusion of the National Renovators' Business Course elevates some subtasks to the skill development level.

ALBERTA	Sub-Block	Title	% of Tasks Covered	% of Subtasks Covered
BLOCK A: Business Planning	A1	Definition of Business Goals	100	100
	A2	Development of Marketing and Sales Plans	100	100
	A3	Development of a Financial Plan	100	100
	A4	Development of an Operating Plan	100	100
	A5	Development of a Human Resource Plan	100	100
BLOCK B: Implementation of the Business Plan	B1	Business Management	100	100
	B2	Marketing and Sales	100	100
	B3	Financial Management	100	100
	B4	Human Resource Management	100	100
	B5	Project Management	100	100
	B6	Project Supervision	100	100
	B7	Client Relations	100	100
BLOCK C: Monitoring and Evaluation of the Business Plan	C1	Monitoring & Evaluation of Objectives	100	100
	C2	Monitoring & Evaluation of Marketing & Sales Plans	100	100
	C3	Monitoring & Evaluation of the Financial Plan	100	100
	C4	Monitoring & Evaluation of the Operating Plan	100	100
	C5	Monitoring & Evaluation of Human Resources	100	100

3.3 Saskatchewan

In Saskatchewan, there are seven courses required for the Certified Professional Home Builder.

1. Business Management
2. Finance and Banking
3. Construction Management
4. Service and Warranty
5. Costing and Estimating
6. Sales – New Homes
7. Code and Construction Guide for Housing

The results of the course analysis are summarized in the following table. Block A, Business Planning, is covered to some extent in all five sub-blocks.

Block B, Implementation of the Business Plan, is covered to some extent in all of the seven sub-blocks.

Block C, Monitoring and Evaluation of the Business Plan, is covered to some extent in all five sub-blocks. Because the courses are taken by correspondence, all of the subtasks are covered at the awareness and knowledge levels.

SASKATCHEWAN	Sub-Block	Title	% of Tasks Covered	% of Subtasks Covered
BLOCK A: Business Planning	A1	Definition of Business Goals	100	53
	A2	Development of Marketing and Sales Plans	60	28
	A3	Development of a Financial Plan	100	90
	A4	Development of an Operating Plan	63	62
	A5	Development of a Human Resource Plan	100	92
BLOCK B: Implementation of the Business Plan	B1	Business Management	90	85
	B2	Marketing and Sales	56	43
	B3	Financial Management	88	83
	B4	Human Resource Management	100	79
	B5	Project Management	76	77
	B6	Project Supervision	100	73
	B7	Client Relations	100	63
BLOCK C: Monitoring and Evaluation of the Business Plan	C1	Monitoring & Evaluation of Objectives	100	100
	C2	Monitoring & Evaluation of Marketing & Sales Plans	29	19
	C3	Monitoring & Evaluation of the Financial Plan	100	94
	C4	Monitoring & Evaluation of the Operating Plan	50	47
	C5	Monitoring & Evaluation of Human Resources	100	82

3.4 Manitoba

To be a Certified Master Builder in Manitoba a company must employ an individual who has a current Certified Housing Professional Diploma. There are six courses required for the diploma.

1. Business Planning
2. Financial Management
3. Land/Legal
4. Marketing and Sales
5. Design Management
6. Construction Management

For the Certified Renovation Professional Diploma, the National Renovators' Business Course is required (see page 18 for an analysis of this course). To be a Certified Master Renovator, a company must employ an individual who has this diploma.

The results of the course analysis for Certified Housing Professional Diploma are summarized in the following table. All of the Blocks are covered to the subtask level. Most of the subtasks are covered at the knowledge and skill development levels.

MANITOBA	Sub-Block	Title	% of Tasks Covered	% of Subtasks Covered
BLOCK A: Business Planning	A1	Definition of Business Goals	100	100
	A2	Development of Marketing and Sales Plans	100	100
	A3	Development of a Financial Plan	100	100
	A4	Development of an Operating Plan	100	100
	A5	Development of a Human Resource Plan	100	100
BLOCK B: Implementation of the Business Plan	B1	Business Management	100	100
	B2	Marketing and Sales	100	100
	B3	Financial Management	100	100
	B4	Human Resource Management	100	100
	B5	Project Management	94	95
	B6	Project Supervision	100	97
	B7	Client Relations	100	100
BLOCK C: Monitoring and Evaluation of the Business Plan	C1	Monitoring & Evaluation of Objectives	100	100
	C2	Monitoring & Evaluation of Marketing & Sales Plans	100	100
	C3	Monitoring & Evaluation of the Financial Plan	100	100
	C4	Monitoring & Evaluation of the Operating Plan	100	100
	C5	Monitoring & Evaluation of Human Resources	100	100

3.5 Ontario

The Ontario Home Builders' Association (OHBA) does not currently provide training except through the Ontario Builder Forum and related training seminar, website and magazine. The reason is that there are many programs provided at the local level, at the community colleges, by the Provincial Building Officials Association, and through unions. In addition, there are programs that individual members provide within their own companies. The OHBA does respond to member demands and will include a requested topic in the Builder Forum or find another training source. (Note: similar kinds of activities are often found in other regions/provinces as well)

The Ontario Builder Forum, which is put on by the OHBA, provides a training platform for all builders and renovators.

At the local level the training varies from very comprehensive in Toronto to specific in smaller locals. Many locals also provide joint training with their local construction associations to conserve resources and reduce costs.

In Ontario, there is a broader partnership between the OHBA, the Warranty Program and the community colleges. At the community college level the programs are fairly detailed and well documented though there is no central repository of, or coordination between colleges. Each community college provides courses to cater to their community. It is possible that a certification program for builders and renovators will be implemented through the colleges.

The OHBA training committee is currently looking towards compiling a catalogue of training for residential construction in Ontario.

3.6 Quebec

In Quebec, builders and renovators are required to have a Contractors' license. Training is delivered through APCHQ (which is the HBA equivalent in Quebec), the Association des constructeurs d'habitations du Québec (ACQ) and the Association patronale des entrepreneurs en construction du Québec (APECQ). All training is approved by La Régie du bâtiment du Québec.

The Contractor Training Program consists of three courses, two of which contain a number of modules.

1. Administration of the Health and Safety Act
2. Business Administration
 - 2.1 Finance and Accounting
 - 2.2 Legal and Labour Relations
 - 2.3 Management

3. Project Management
 - 3.1 Specification and Plan Reading
 - 3.2 Cost Estimation and Bidding Process
 - 3.3 Codes and Standards
 - 3.4 Project Management

The results of the course analysis are summarized in the following table. Block A, Business Planning, is covered to some extent in all of the sub-blocks.

Block B, Implementation of the Business Plan, is covered to some extent in six of the seven sub-blocks and partially in one sub-block.

Block C, Monitoring and Evaluation of the Business Plan is covered in four of the five sub-blocks and partially in one sub-block. The subtasks are covered at the awareness, knowledge and skill development levels in a fairly even distribution.

QUEBEC	Sub-Block	Title	% of Tasks Covered	% of Subtasks Covered
BLOCK A: Business Planning	A1	Definition of Business Goals	100	100
	A2	Development of Marketing and Sales Plans	100	70
	A3	Development of a Financial Plan	100	100
	A4	Development of an Operating Plan	75	81
	A5	Development of a Human Resource Plan	100	100
BLOCK B: Implementation of the Business Plan	B1	Business Management	100	98
	B2	Marketing and Sales	22	24
	B3	Financial Management	100	100
	B4	Human Resource Management	100	100
	B5	Project Management	76	82
	B6	Project Supervision	100	100
	B7	Client Relations	100	100
BLOCK C: Monitoring and Evaluation of the Business Plan	C1	Monitoring & Evaluation of Objectives	100	100
	C2	Monitoring & Evaluation of Marketing & Sales Plans	14	10
	C3	Monitoring & Evaluation of the Financial Plan	100	100
	C4	Monitoring & Evaluation of the Operating Plan	100	100
	C5	Monitoring & Evaluation of Human Resources	100	100

3.7 Atlantic Provinces

The Atlantic Home Builders' Training Board (AHBTB) develops and delivers a full complement of management, regulatory and technical courses to support skills development in the residential construction industry in Prince Edward Island, New Brunswick, Nova Scotia and Newfoundland and Labrador. The AHBTB is the sole deliverer of courses to address Atlantic Home Warranty Program and Nova Scotia Home Builders' Association mandatory training requirements. In addition, the AHBTB partners with industry organizations, real estate associations and others in the delivery of training for their members.

The AHBTB core courses are as follows:

- Atlantic Housing Professional Studies
- NBC – Part 9 The House
- Better Built House
- Site Supervision
- Energy Efficient Retrofits

The Atlantic Home Building and Renovation Sector Council (AHRSC) has focused its attention on the general training needs of the industry in the Atlantic Region. In partnership with others the AHRSC coordinates the delivery of the following:

- National Renovators' Business Course
- CMHC-CHBA Builder Workshops
- Moisture in Atlantic Housing
- Various computer courses
- R-2000 Builders Workshop
- Home Inspection Training

For this study, the Atlantic Housing Professional Studies and the National Renovators' Business Course (see page 19) were analyzed, as these have been developed to address the competencies identified in the National OA.

In the Atlantic Provinces, seven modules make up the Atlantic Housing Professional Studies course:

1. Business Planning
2. Marketing and Sales
3. Banking and Borrowing
4. Construction Management
5. Design Management
6. Land and Legal
7. Financial Management

The results of the course analysis are summarized in the following table. All of the blocks are covered to the subtask level, with the majority of the subtasks covered at the skill development level.

ATLANTIC PROVINCES	Sub-Block	Title	% of Tasks Covered	% of Subtasks Covered
BLOCK A: Business Planning	A1	Definition of Business Goals	100	100
	A2	Development of Marketing and Sales Plans	100	100
	A3	Development of a Financial Plan	100	100
	A4	Development of an Operating Plan	63	67
	A5	Development of a Human Resource Plan	100	100
BLOCK B: Implementation of the Business Plan	B1	Business Management	80	78
	B2	Marketing and Sales	100	100
	B3	Financial Management	100	100
	B4	Human Resource Management	100	100
	B5	Project Management	94	95
	B6	Project Supervision	100	97
	B7	Client Relations	100	100
BLOCK C: Monitoring and Evaluation of the Business Plan	C1	Monitoring & Evaluation of Objectives	100	100
	C2	Monitoring & Evaluation of Marketing & Sales Plans	100	100
	C3	Monitoring & Evaluation of the Financial Plan	100	100
	C4	Monitoring & Evaluation of the Operating Plan	100	95
	C5	Monitoring & Evaluation of Human Resources	100	100

3.8 National Renovators' Business Course

The National Renovators' Business Course was developed for use throughout Canada. It was formerly known as the National Renovators' Training Program.

The results of the course analysis are shown in Appendix A and are summarized in the following table. Block A, Business Planning, is covered to some extent in all of the five sub-blocks, most at the knowledge and skill level.

Block B, Implementation of the Business Plan is covered to some extent in all seven sub-blocks. Most of the subtasks are covered at the awareness, knowledge and skill development levels in a fairly even distribution.

Block C, Monitoring and Evaluation of the Business Plan is covered in all of the five sub-blocks, most at the awareness level.

NATIONAL RENOVATORS' BUSINESS COURSE	Sub-Block	Title	% of Tasks Covered	% of Subtasks Covered
BLOCK A: Business Planning	A1	Definition of Business Goals	100	100
	A2	Development of Marketing and Sales Plans	90	90
	A3	Development of a Financial Plan	100	100
	A4	Development of an Operating Plan	88	81
	A5	Development of a Human Resource Plan	100	100
BLOCK B: Implementation of the Business Plan	B1	Business Management	90	75
	B2	Marketing and Sales	67	79
	B3	Financial Management	100	100
	B4	Human Resource Management	100	100
	B5	Project Management	100	100
	B6	Project Supervision	50	27
	B7	Client Relations	100	100
BLOCK C: Monitoring and Evaluation of the Business Plan	C1	Monitoring & Evaluation of Objectives	100	100
	C2	Monitoring & Evaluation of Marketing & Sales Plans	100	100
	C3	Monitoring & Evaluation of the Financial Plan	100	100
	C4	Monitoring & Evaluation of the Operating Plan	100	100
	C5	Monitoring & Evaluation of Human Resources	100	100

3.9 Comparison of Regional/Provincial Courses

The following table illustrates a comparison of all the regional/provincial courses in this study.

The majority of sub-blocks are totally covered by all of the regions in this study. Those sub-blocks covered to a lesser extent include: A4 Development of an Operating Plan; B1 Business Management; B2 Marketing and Sales; B5 Project Management; C2 Monitoring and Evaluation of the Marketing and Sales Plan; and C4 Monitoring and Evaluation of the Operating Plan.

Comparison of the Builder/Renovator Training Courses in Canada

Block	Sub-Block	British Columbia		Alberta		Saskatchewan		Manitoba		Quebec		Atlantic Provinces		
		% of Tasks Covered	% of Subtasks Covered	% of Tasks Covered	% of Subtasks Covered	% of Tasks Covered	% of Subtasks Covered	% of Tasks Covered	% of Subtasks Covered	% of Tasks Covered	% of Subtasks Covered	% of Tasks Covered	% of Subtasks Covered	
A: Business Planning	A1: Definition of Business Goals	0	0	100	100	100	53	100	100	100	100	100	100	
	A2: Development of Marketing & Sales Plans	100	100	100	100	60	28	100	100	100	70	100	100	
	A3: Development of a Financial Plan	100	100	100	100	100	90	100	100	100	100	100	100	
	A4: Development of an Operating Plan	50	52	100	100	63	62	100	100	75	81	63	67	
	A5: Development of a Human Resource Plan	100	100	100	100	100	92	100	100	100	100	100	100	
	B: Implementation of the Business Plan	B1: Business Management	80	81	100	100	90	85	100	100	100	98	80	78
		B2: Marketing and Sales	100	100	100	100	56	43	100	100	22	24	100	100
B3: Financial Management		63	65	100	100	88	83	100	100	100	100	100	100	
B4: Human Resource Management		50	24	100	100	100	79	100	100	100	100	100	100	
B5: Project Management		94 (82)	90 (84)	100	100	76	77	94	95	76	82	94	95	
C: Monitoring & Evaluation of the Business Plan	B6: Project Supervision	100	97	100	100	100	73	100	97	100	100	100	97	
	B7: Client Relations	100	100	100	100	100	63	100	100	100	100	100	100	
	C1: Monitoring & Evaluation of Objectives	0	0	100	100	100	100	100	100	100	100	100	100	
	C2: Monitoring & Evaluation of Marketing & Sales Plans	100	100	100	100	29	19	100	100	14	10	100	100	
	C3: Monitoring & Evaluation of the Financial Plan	100	94	100	100	100	94	100	100	100	100	100	100	
	C4: Monitoring & Evaluation of the Operating Plan	0	0	100	100	50	47	100	100	100	100	100	95	
	C5: Monitoring & Evaluation of the Human Resources	67	73	100	100	100	82	100	100	100	100	100	100	

4.0 Summary of the New Home Builder/Renovator Programs in Canada

The current operations of new home builder/renovator certification programs in Canada varies from region to region. However, in terms of courses and required criteria, there are common characteristics. The following is a comparison of the Canadian regional/provincial programs (detailed tables are in Appendix B).

4.1 Certification

In British Columbia, Manitoba and Alberta there is separate certification for builders and renovators; this is not the case in the other regions/provinces. In all cases, except Quebec where a license is required, certification is voluntary. In all the regions in this study, the company must employ an individual that has met the requirements of certification. The number of years experience required by the individual or business is five years in B.C., Alberta and Manitoba, and three years in Nova Scotia; none is required in Saskatchewan. The designation for all regions is only valid for one year.

In B.C., certification requirements for the builder or renovator business include: employing, in a position of authority, a Registered Housing or Renovation Professional; being a member of the CHBA; and for new home builders, being a member in good standing with a warranty provider. Other requirements are specific to builders or renovators.

In Alberta, certification requirements include: the completion of courses; agreement to abide by PHBIA's Code of Ethics and Rules and Regulations; and either the company or the individual must hold membership in a local association of the Alberta Home Builders' Association.

In Saskatchewan and Manitoba, certification requirements are that the company must employ at least one individual who meets the course requirements.

In Quebec, applicants for a license must comply with conditions such as warranty membership, sound financing, and provision of financial coverage for fraud and malversation.

In Nova Scotia, certification requirements include: WCB coverage; liability insurance; third-party warranty coverage; incorporation/registration to do business in Nova Scotia; a Nova Scotia Construction Association "Letter of Good Standing"; membership in the CHBA; and various other miscellaneous requirements.

Note: In 1998, the Nova Scotia Home Builders' Association (NSHBA) inaugurated the province's first industry-driven Certification Program for the residential construction and renovation sector. The program is available to all qualifying home builder and renovator members of the NSHBA. The NSHBA program is a voluntary certification program, based upon Atlantic guidelines, which were developed by the Atlantic Home Builders' Training Board (AHBTB) through an industry-government advisory committee operating from 1990 to 1993. This includes certification of the company – the Certified Residential Builder (CRB), and certification of the individual – Certified Housing Professional (CHP). For this study, analysis was conducted on these programs. There are currently no similar certification programs offered by the HBAs in the other three Atlantic Provinces.

4.2 Courses

The number of courses required varies from 14 in Alberta, for Accredited Master Builder, to four in Nova Scotia for the NSHBA Certification Program. There are five basic content areas that are generally common to each of the regions: Financial Management; Sales and Marketing; Construction Law; Building Code and Business Management. Other courses offered by some regions include: Project Management; Service and Warranty; Estimating/Purchasing; and Design Management.

In B.C., Alberta and Manitoba, courses can be taken through the local HBAs. Currently, Winnipeg is the only location where the courses can be taken in Manitoba. In Saskatchewan, courses are taken by correspondence. In Quebec, courses are provided by contractor associations and some trade schools throughout the province, and in Nova Scotia, courses are available at various locations.

The duration of courses varies considerably. All courses are two days each in B.C. In Alberta, each course is four days in length. In Saskatchewan, since the courses are offered by correspondence, there is no specific time in which to complete the courses. In Manitoba, total classroom hours is 80. In Quebec, all courses combined total 231 hours, and in Nova Scotia, courses vary from one to seven days in length.

Other courses are recognized in B.C., Saskatchewan, Quebec and Nova Scotia. Candidates are able to challenge courses in B.C., Alberta (up to two courses), Saskatchewan, Quebec and Nova Scotia.

There is no formal PLAR process in any of the regions/provinces. In Alberta, there are plans to put a process in place. Candidates in Saskatchewan can ask to compare courses to the training manuals and challenge the exams. In Quebec, there is an exemption to either take a course or challenge a written exam if an

individual is a recognized architect, construction engineer or technologist, for the Project Management program; or if an individual is either a professional accountant or administrator, for the Business Administration program. There is an informal PLAR process in Nova Scotia. Candidates are evaluated on an individual basis to verify that comparable objectives/learnings were addressed. With successful completion of an equivalent course, the exam(s) may be challenged.

Courses are available year-round in B.C. and Saskatchewan; they are available annually in Alberta and Nova Scotia, and every two years on a rotating basis in Manitoba. In Quebec, training is available two times per year.

In some regions, a minimum number of individuals is required before a course is taught. In B.C., the number must be sufficient to recover all costs of delivery. Twelve are required in Alberta and 10 in Manitoba. The number varies in Quebec; in Nova Scotia there is no minimum.

Course assessments by students are required in all provinces except Saskatchewan. In Nova Scotia, trainers also complete evaluation forms on every delivery, and in Quebec, courses are evaluated by a committee of industry members, teachers and experts.

The cost of courses in B.C. varies depending on the local HBA. In Alberta, the cost is \$399 per course, and in Saskatchewan it is \$100 per course. In Manitoba the cost is \$1500 for all courses. The cost varies in Quebec and in Nova Scotia.

4.3 Testing

Testing of course materials is conducted using exams in all regions. The minimum pass mark ranges from 50 percent in Nova Scotia to 80 percent in B.C. Seventy percent is required in Alberta and Manitoba, and 60 percent is required in Saskatchewan and Quebec.

4.4 Teaching Methods and Trainer Qualifications

The teaching method used in all regions, except Saskatchewan, which is home-study, is in the classroom using lecture, group exercises and other interactive activities.

Trainers in B.C. are experts in their field of study. In Alberta, trainers are Professional Adult Educators/Industry Specialists. In Manitoba, trainers have training experience in the residential construction industry and have also worked in the industry. No prior experience is required in Quebec, and in Nova Scotia,

trainers are required to be active in the industry, as well as demonstrate strong facilitation skills.

4.5 Continuing Education and Professional Development

In Saskatchewan, Quebec and Nova Scotia, there are no continuing education requirements for certification. In B.C., at least six hours are required every year; in Alberta, one course or authorized seminar is required every two years; and in Manitoba, one course per year is required.

There are no professional development requirements in Saskatchewan, Quebec and Nova Scotia. In B.C., individuals must take courses, attend seminars or national conference business sessions, and participate in the HBA. In Alberta, individuals must take a course every two years, and in Manitoba a minimum of three half-day seminars must be completed each year.

4.6 Retention and Renewal Fees

Retention requirements include an annual renewal fee for all provinces, except Saskatchewan. B.C. requires professional development. In Alberta, Saskatchewan and Manitoba a certified individual must be employed by the company.

Renewal fees range from \$100 to \$250 for the company and from \$50 to \$125 for the individual. Quebec requires \$300 per license category. Categories are those of general contractor, like Contractor – New Residential Building, Maintenance, Renovation, Repair and Alteration of Residential Building Contractor, or 'specialized' contractor like plumber, electrician, ventilation, etc.

4.7 Grandfathering

Grandfathering is not accepted in any of the regions.

4.8 Grace Period

Grace period is the time allowed to replace an individual with certification if that individual is no longer employed by the company. There is no grace period in B.C., Alberta and Nova Scotia and one year in Saskatchewan and Manitoba.

4.9 Code of Ethics and Compliance with Building Codes

In B.C., Registered Housing Professionals (RHP) must sign and abide by the Code of Ethics specific to RHPs. In Alberta, PHBIA (Professional Home Builders Institute of Alberta) Accredited Master Builders and Accredited Master Renovators must agree to abide by the Institute Code of Ethics. Certified

Housing Professionals and Certified Renovation Professionals in Manitoba must abide by a Code of Ethics, as well as builder members in Nova Scotia. There is no specific agreement to abide by a Code of Ethics in Saskatchewan and Quebec.

4.10 Builder Rating Programs

An examination of whether or not the educational programs form part of a broader builder rating program aimed at assisting consumers to identify more qualified builders was also conducted. Currently, none of the regions/provinces has an existing builder rating system that considers educational requirements.

In B.C., builders are required by the provincial government Homeowner Protection Act to be licensed and have new home warranty insurance. The Home Builders' Association requires that all be licensed with the Homeowner Protection Office as well. The Association has been lobbying the government to make changes to the Act that would make Education and Training a mandatory part of licensing requirements. It is also working on getting funding for a five star program that would basically rate builders based on what experience and education they have achieved.

In Quebec, there is no rating associated with the contractor licensing system; however, each mandatory warranty program has developed their own rating system that is promoted to the consumer. The APCHQ system takes into account the number of consecutive years the builder was a member of the warranty, the volume of houses built, and the number of justified claims that were processed by the warranty.

In Saskatchewan, Registered Builder Members in the New Home Warranty Program of Saskatchewan offer a Gold Warranty, which is an independent program voluntarily established by members of the industry to protect new home buyers. The New Home Warranty Program is also working on having a customer choice award presented to builders, which will be based on a survey of customers. It will be only for builders who wish to participate.

J.D. Power and Associates, an American-based marketing information services firm in Toronto, conducts research that is used by a wide variety of industries to improve product quality and consumer satisfaction. The company is currently in the process of setting up a homebuilder rating system in Canada, starting in Toronto. It will be based on responses from consumers.

4.11 Regional/Provincial Courses Not Covered in the National OA

There are many courses that are provided by the regions/provinces that expand upon the tasks identified in the National OA. The following is a list of courses (both mandatory and optional) that are offered:

1. Building Technologies for the New Millennium (B.C.)
 - Specific requirements of R-2000 housing
 - How R-2000 can increase sales and profits
 - The secrets to preventing condensation and moisture movement
 - Cost effective ventilation solutions
 - Advanced framing techniques that save money
 - New options in air barrier materials and methods
 - How to close any sale with the 11 key benefits of R-2000
 - Simple ways to tap into an exciting promotional campaign
2. BC Building Code – Part 9 (B.C.)
3. Building Codes and Standards (Alberta)
4. Moisture Control Technician (Alberta)
 - Why Moisture Control is Important
 - Building Science Principle: Controlling Moisture Accumulation and Removal
 - Design and Construction Practices to Control Moisture in Foundations
 - Design and Construction Practices to Control Moisture in Walls
 - Design and Construction Practices to Control Moisture in Roofs
 - Design and Construction Practices for Lot Drainage
5. Blueprint Reading (Alberta)
 - Introduction to the basics of blueprint reading
6. Land Development (Alberta)
 - Develop an understanding of planning regulations and the hierarchy of statutory documents that control land development in Alberta
 - Work through the process of land acquisition, financing, site planning, engineering, construction and marketing
7. Code and Construction Guide for Housing (Saskatchewan)
8. Administration of the Health and Safety Act (Quebec)
9. Specification and Plan Reading (Quebec)

10. Codes and Standards (Quebec)
11. National Building Code (Nova Scotia)
12. Leadership in Safety Excellence (Nova Scotia)
 - The supervisor's role
 - Training design
 - Effective safety meetings
 - Inspections
 - Accident investigations
13. Moisture in Atlantic Canada (Nova Scotia)
 - Based on a series of tests simulating moisture in house walls
14. Computer Training for Builders (Nova Scotia)
 - Introduction to how computers can be used in a business
15. Energy Efficient Retrofits (Nova Scotia)
 - House as a system
 - Building analysis
 - Building products: specifications and installations
 - Retrofitting the building envelope
 - Improving mechanical ventilation
 - Heating systems basics
 - Appliance and lighting efficiency
 - Healthy housing

Areas that are clearly relevant for the owner/senior manager that were not adequately identified in the National OA include:

- Employee/Self-Employed
- Privacy Legislation
- Personal and Business Liability
- Builder's Lien

5.0 Summary of the New Home Builder/Renovator Programs in the United States and Australia

5.1 United States

In the United States, there are several designations offered by the National Association of Home Builders. For the purposes of this report, four designations were summarized: Certified Graduate Associate (CGA), Certified Graduate Builder (CGB), Certified Graduate Remodeler (CGR) and Graduate Master Builder (GMB). In all cases, title is held by the individual. No experience is required for the CGA certification, two years is required for the CGB, five years is required for the CGR and five or ten years is required for the GMB. All designations require 12 hours of continuing education every three years.

Certified Graduate Associate (CGA)

The CGA designation is earned by completing 36 hours of classroom instruction in three required and three elective courses.

Required Courses:

1. Introduction to Business Management
2. Customer Service
3. Sales and Marketing or Sales and Marketing for Remodelers

Elective Courses:

1. Builders, Remodelers and Indoor Air Quality
2. Building Codes and Standards
3. Building Technology: Structures and Exterior Finishes
4. Building Technology: Systems and Interior Finishes
5. Business Accounting and Job Cost
6. Construction Contracts and Law
7. Construction Industry and the ADA
8. Design/Build
9. Energy Efficient Construction
10. Estimating
11. Finance Banking
12. Insurance Reconstruction
13. Land Development, Site Planning and Zoning
14. Negotiating Skills
15. Off-Site Project Management
16. On-Site Project Management
17. Quality Construction
18. Scheduling

Experience in the business is not required for the CGA designation. To maintain the designation, graduates are required to complete a total of 12 hours of continuing education every three years.

Certified Graduate Builder (CGB)

The CGB designation requires two years of building industry experience. Prior to taking the courses, candidates write a Builder Assessment Review (BAR) exam, which measures knowledge and experience in four core areas. The BAR results determine the number of courses required from the four key areas of the designation curriculum. The following courses are available:

1. Building Technology
 - Building Codes and Standards
 - Building Technology: Systems and Interior Finishes
 - Building Technology: Structure and Exterior Finishes
 - Indoor Air Quality
 - Energy Efficient Construction
2. Requirements for Certification
 - Business Accounting and Job Costs
 - Construction Contracts and Law
 - Estimating
 - Finance Banking
 - Introduction to Business Management
3. Project Management
 - Design/Build
 - Off-Site Project Management
 - On-Site Project Management
 - Scheduling
4. Sales and Marketing
 - Customer Service
 - Land Development, Site Planning and Zoning
 - Sales and Marketing

Certified Graduate Remodeler (CGR)

The CGR designation requires a minimum of five years of remodeling experience. Prior to taking the courses candidates must write the Professional Remodeler Experience Profile (PREP) exam. This exam measures knowledge and experience in five core areas of remodeling business management. The PREP results determine the amount of course work in each of the five core areas. The courses available for the designation are as follows:

1. Marketing and Sales
 - Sales and Marketing for Remodelers
 - Customer Service
2. Business Administration
 - Introduction to Business Management
 - Negotiating Skills
 - Business Accounting and Job Cost
3. Design, Estimating and Job Cost
 - Design/Build for Remodelers
 - Estimating for Builders and Remodelers
 - Quality Construction
4. Contracts, Liability and Risk Management
 - Construction Contracts and Law
 - Negotiating Skills
5. Project Management
 - Off-Site Project Management
 - On-Site Project Management
 - Scheduling

Graduate Master Builder (GMB)

For the GMB designation, individuals must have previously attained the CGA, CGB or CGR designations and have five years experience, or have completed three CGA, CGB or CGR courses and have 10 years of experience. The GMB courses are more advanced with in-depth instruction geared towards experienced building professionals. To earn a GMB certificate, a participant must complete five GMB courses or complete four GMB courses plus two CGB/CGR courses.

1. Land Acquisition and Development Finance
2. Liability and Risk Management for Building Professionals
3. Negotiating Skills
4. Diversification: New Profits for Builders
5. Financial Management
6. Quality Construction

The courses offered in the above programs align closely with the courses offered in Canada for builders and renovators.

5.2 Australia

There are several states in Australia with differing programs. For the purposes of this report, the Registered Building Practitioners program in Victoria was chosen; Victoria is one of the most advanced states in terms of programs for registering builders.

In Victoria, there is a comprehensive regulatory approach wherein commercial and residential builders (as well as building designers, certifiers, inspectors, etc.) must be registered with the Building Practitioners Board (BPB). New home builders and renovators must be registered (effectively licensed) by the BPB if they undertake work directly for a building owner that requires a building permit (all building work in excess of \$5,000 in value). The BPB operates as part of the Building Commission – a state-run regulatory body for the building industry.

See Appendix D for a detailed summary of the program.

Courses offered by the Housing Industry Association (one of the industry associations offering such courses) are as follows:

1. Business Planning and Accounting
2. Legal Considerations
3. Estimating
4. Employment Related Issues
5. Occupational Health and Safety
6. Legislation/Licensing/Statutory Compliance
7. Building Codes and Standards
8. Environmental Considerations
9. Building/Construction Technology

The Housing Industry Association in Australia offers courses that are very similar to the courses offered by the regions/provinces in Canada; however, it includes a significant portion on building/construction technology.

6.0 Overview of the Proposed Harmonized pan-Canadian Model

The following is an overview of the proposed harmonized model for builders and renovators, including designation and exam, courses and candidate assessment review, program criteria, and procedures. The model is based on the National Occupational Analysis for the New Home Builder and Residential Renovation Contractor with the addition of common provincial course elements that deal with skills either not currently listed or adequately referenced in the OA.

Analyses of Canadian regional new home builder/renovator certification programs and programs in the United States, and to some extent Australia, were used to develop this model. The model will present a standard by which individual provincial (regional) training efforts can align their courses to the National OA. **The content is a base minimum; regions can go beyond as desired for their own needs.**

6.1 Designation and Exam

The proposed designation is the Canadian Graduate Builder or Canadian Graduate Renovator (CGB or CGR), which can be attained by challenging a CGB or CGR exam. The CGB and CGR exams will offer a means of providing greater consistency in educational initiatives throughout the country. The exam would be composed of five sections that align with the content areas for the Canadian Graduate Builder (Renovator) program. (Note: the exam was not developed as part of this project but would form part of the proposed pan-Canadian model)

The National OA perhaps needs to be updated; however, doing so is time consuming, onerous and expensive. It may be more reasonable to include additional content in the CGB and CGR exams, which would reflect the additional content currently being offered in many areas but having only minor reference in the OA. Such enhancements (such as safety, privacy etc.) would add to the value of the CGB and CGR designation. Regular additions to the exam would help keep the designation current. NETAC or equivalent could direct the development and currency of the exam.

The value of the CGB and CGR designations is as follows:

- Provinces (regions) will be able to determine what additional training modules/programs would bring their curriculum into closer alignment with the OA. Provincial associations will also have the ability to assess which of their programs extend beyond the OA.
- A designation will result in enhanced transportability of accreditation/certification from province to province.
- New programs can be designed to align with the CGB and CGR designation.

6.2 Courses and Candidate Assessment Review

Courses are based on the National Occupational Analysis for New Home Builder and Residential Renovation Contractor. Five content areas are proposed (Appendix F): Project Management, Human Resources, Financial Management, Marketing and Sales, and Business and Operations Plan. The tasks (from the OA) that relate to each content area are listed. The rationale for a core set of courses is as follows:

- Establishes a base set of tasks which builders (owners and senior managers) need to be capable of performing.
- Acknowledgment that some tasks must be accomplished for the company to be successful, but are not required to be performed by, the owner/senior manager. Although such tasks must be managed by the owner.
- Alignment of the core courses with the National Occupational Analysis.

A Candidate Assessment Review (CAR), which measures knowledge and experience in the five content areas of the business of building (renovating) is proposed in order to allow experienced individuals to challenge the CGB or CGR exam without taking all or some of the provincial (regional) courses. CAR would be a prior learning assessment tool similar to PLAR (Prior Learning and Assessment Recognition), which is a process of identifying, assessing and recognizing what a person knows and can do. PLAR gives equal value to learning and skills whether these skills are obtained from school, community work, on-the-job training, or other life experiences. CAR is different from PLAR in that it would only be an exam that measures knowledge and experience.

The CAR would be a 3-hour, 120 multiple-choice assessment. The results would identify candidate competencies and deficiencies, and determine training that must be taken to be eligible to challenge the Canadian Graduate Builder (Renovator) exam. An example of the CAR exam is shown in Appendix E.

The rationale for a CAR prior learning assessment tool:

- Most provincial associations have lobbied against any form of grandfathering.
- A means of determining an applicant's existing knowledge and skill level would permit a means of determining the applicant's strengths and weaknesses. A training plan for that individual could then be developed.
- The CAR would confirm an individual's ability to successfully challenge the various elements of the exam – allowing the applicant to bypass training courses.

6.3 Program Criteria

1. For the individual to receive the CGB or CGR designation they must successfully complete the CGB or CGR exam and have three years of experience as an owner of, or in a senior management position with, a building or renovating company.
2. For the company to call itself a CGB or CGR it must employ in a position of responsibility an individual with a CGB or CGR designation.
3. The company must be a member of an industry association, e.g., provincial home builders' association.
4. The company must be a member in good standing with a new home warranty program or new home warranty insurance company (Builder).
5. The company 'designation' is established by the province or region.

6.4 Procedures

The following are examples of procedures:

1. New entrants could write the CAR exam, and if they are successful, challenge the CGB or CGR exam. If they pass the exam, they must have worked three years as an owner or senior manager in order to achieve the CGB or CGR designation.
2. If CAR shows the need for courses in certain content areas, the candidate must take the applicable provincial courses. Then they are eligible to take the CGB or CGR exam.
3. The exam is broken up into content areas. Individuals must achieve a minimum of 70 percent in every content area on both exams.
4. If the candidate fails any part of the CGB or CGR exam, then they must wait six months to re-take the part of the exam that they failed.
5. If the candidate has already achieved a provincial (regional) designation, they can bypass the CAR exam and challenge the CGB or CGR exam.
6. The province (region) charges fees for CAR exam challenges and CGB or CGR exam challenges and is responsible for administering the exams.

7. In order to maintain the CGB and CGR designations, a minimum of 12 hours of continuing education credits must be taken annually.

As the system evolves it is foreseen that the appropriate sections of the CGB and CGR exams may become the actual course exams for the provincial programs. In this way, successful completion of the provincial programs would automatically convey the CGB or CGR designation.

Further, if colleges were to offer a certification for new home builder/renovator owners/senior managers, the CGB and CGR exams could be used and the CGB or CGR designation would accompany the college certificate.

6.5 Costs and Administration

The costs associated with the proposed pan-Canadian model would be in the development and delivery of the exam. Ongoing administration of the exam would be the responsibility of the regions/provinces. This would include administering the exam, keeping track of those with the designation, and keeping track of continuing education credits. Those challenging the exam would be responsible for the cost.

It should be noted that it is not intended that this designation would be affiliated with the Canadian Home Builders' Association.

There are numerous details that would need to be considered such as:

- Funding to develop the exam
- Agreement by all regions/provinces on a national exam
- Updating the exam to remain current and valid

7.0 Results of the British Columbia Focus Group and Key Informant Interviews

The following is a report on the results of the focus group and key informant interviews for the validation of the proposed harmonized pan-Canadian model. Location: CHBA-BC Office, BCIT – Vancouver Date: March 26, 2004.

7.1 Participants

The focus group and key informant interviews were conducted under the direction of M.J. Whitemarsh - Executive Director, CHBA-BC. Ms. Whitemarsh was also an active participant in the discussions.

Kerry Jothen
Human Capital Strategies

Patrick Caporale
Caporale Construction

Herman Rebneris
Cottage Grove Developments

Bob Rasmus
RJR Construction

Project consultants
Brian Marshall
Sun Ridge Group

Keith Hanson
Sun Ridge Group

Last minute regrets:
Ken Sawatsky -Kenorah Design & Construction

Ron Oriux - Ron Oriux Construction

Harold Kohen

Mark Ashcroft

John Bell - Home Owner Protection Office

Eric Gerrits – Homescape Buildings & Design

7.2 Process

Two sections from this report were used to support the discussions and key informant interviews:

1. Summary of the New Home Builder/Renovator Programs (Section 4.0)
2. Proposed pan-Canadian harmonized model for builders and renovators (Section 6.0)

The 'Summary' document was presented to allow participants the opportunity to gain an understanding of the certification and educational programs currently offered in all provinces/regions of Canada.

The 'Proposed Model' document was presented to support participant discussion on the proposed harmonized pan-Canadian model.

7.3 The Proposed Model

The proposed harmonized pan-Canadian model would include:

1. A definition of five content areas with all tasks contained in the National Occupational Analysis appropriately allocated to the content areas.
2. An exam in each of the five content areas that would be used to measure the knowledge of those who are eligible to challenge the exams.
3. A Candidate Assessment Review (CAR) exam, which measures knowledge and experience in each of the five content areas and is used to determine the content areas in which candidates require training and those who can directly challenge the exam.
4. A designation 'Canadian Graduate Builder (CGB)' or 'Canadian Graduate Renovator (CGR)' to be granted to those who successfully challenge the exams in each of the five content areas and have gained sufficient business experience.
5. Suggested criteria for companies that wish to utilize those persons with their CGB or CGR designation.

7.4 Discussion, Perspectives and Issues

1. The five content areas as presented were endorsed as the core course content areas.
 - a. It was agreed that all provinces and regions have a series of core courses associated with their programs.
 - b. It was felt that the Registered Housing Professional courses are generally well aligned with the five course areas presented and for those areas that are not aligned, minimal effort would be required to achieve alignment.

2. The concept of using a Candidate Assessment Review (CAR) was endorsed and encouraged by all.
 - a. For new entrants it was felt that the CAR would be a good way to determine which courses the participant should take.
 - b. It was felt that mandatory participation in courses may not be necessary if the candidate can prove their knowledge that was gained from previous experience and/or studies.
 - c. It was felt that the CAR may also be a useful tool to encourage existing and experienced builders and renovators to become certified. The CAR may allow experienced people to bypass taking courses and go directly to challenging exams.
 - d. It was felt that CAR may help existing and experienced builders and renovators realize that taking a course or two in specified areas may be beneficial to them.

3. The concept of having a CGB or CGR designation was endorsed and encouraged by all.
 - a. It was felt there was a need for establishing a mechanism for determining a minimum standard of performance for graduates of any provincial/ regional program.
 - b. It was felt that granting equivalencies from one province or region to another would be possible if everyone used the CGB and CGR exams.
 - c. It was felt that the exam would help the provinces/regions evaluate the effectiveness of their courses on a comparative basis with each other.
 - d. It was felt that as new courses are developed for implementation at the provincial/regional level that the exam could be expanded to include the new subject areas. (This is a simple way to effectively update the information contained in the National Occupational Analysis without actually going through a formal updating process. Perhaps NETAC can play a role in helping to identify new courses that would be valuable in all regions)
 - e. It was felt that candidates challenging the five course content exams should achieve at least 70% as a passing mark.
 - f. It was felt that anyone who did not achieve the passing mark in any of the five content exams would be allowed to challenge the exam again, and if failed a second time, would be required to wait three months before re-writing or upon completion of the relevant course.

4. The concept of creating recognition for those who successfully challenge the exam and have sufficient experience (minimum three years) was endorsed and encouraged by all.

- a. It was felt that many builders and renovators would like to gain CGB or CGR 'recognition', as it would be seen as prestigious and valuable to promote in show homes, displays and sales literature.
 - b. It was felt that many builders and renovators would like to compare their knowledge level (credentials) with that of other builders and renovators across Canada - on a fair and equitable basis. (This would apply to the CGB and CGR designation only; it does not presume that it is equivalent to other provincial or college designations)
 - c. It was felt that builders and renovators want to know that their provincial/regional designations are at least as good as they are in any other province/region of Canada.
 - d. It was felt that wherever possible, the credential should be promoted to the public and to potential home buyers. National, provincial and local association web-sites, publications and other promotional initiatives could be easily used to promote and explain the certification.
5. The concept of requiring at least eight hours per year of continuing education credits was endorsed and encouraged by all.
- a. It was a common feeling that all certifications must be kept current through annual educational activities.
 - b. It was felt that an update session that could be used by all provinces/regions would be a valuable asset. This update could deal with code issues, new or revised standards, technical updates, privacy legislation, employee/self-employed, management and QA advancements, relevant homeowner protection issues, software, health and safety, best practices, emerging issues, strategic leadership, etc. This could be delivered at the Builder Forums, which are fundamentally education and training update sessions offered by the HBAs in most provinces. The national update module could be integrated/delivered as part of these forums. Relevant training modules could also be developed and delivered by CMHC, NRC/IRC, NRCAN, CRA, Construction Safety Associations, etc.
6. Technical training for builders and renovators needs to be enhanced.
- a. It was felt that today's owners/senior managers need to have at least a conceptual understanding of the technologies upon which current housing is based.
7. Training in Business Technologies needs to be enhanced.
- a. It was felt that many builders and renovators are not taking advantage of the business technology available to help with business operations and management.

8. The participants all agreed that there was need in Canada for training and certification of the residential workforce.
 - a. It was felt that builder and renovator training and certification programs are in place and being updated but that training for those people that builders and renovators hire or contract with is lacking.
 - b. Based on other provincial training/designation programs, and stated industry needs, the development of a Residential Construction Superintendent designation (Appendix H) was endorsed.
 - c. It was felt that trades training needs to be enhanced and made more relevant but non-trades training and certification also need attention.

8.0 Conclusion

The analysis indicated that the new home builder/renovator courses in all of the Canadian regions/provinces in this study are similar and that they are generally aligned with the National Occupational Analysis for New Home Builder and Residential Renovation Contractor. The main difference is the length of time that is devoted to a particular topic.

There are six courses common to each of the regions: Financial Management, Sales and Marketing, Construction Law, Project Management, Building Code, and Business Management.

For this project, the Occupational Analysis for New Home Builder and Residential Renovation Contractor was used to determine five major content areas: Business and Operations Plan, Marketing and Sales, Financial Management, Human Resources and Project Management. All these areas are consistent with the current course content of the regions/provinces, except for Human Resources, which is generally covered by some of the other courses.

All five areas in the OA are closely aligned with designations in the United States, except for Human Resources, which is generally covered by some of the other courses. In Australia, the Housing Industry Association offers courses that are similar to the courses offered by the regions/provinces in Canada; however, a significant portion of the course materials covers building/construction technology.

The current operations of new home builder/renovator certification programs in Canada varies from region to region; however, in terms of courses and requirements, there are several common characteristics.

A harmonized pan-Canadian model for builders and renovators would be based on the National Occupational Analysis for the New Home Builder and Residential Renovation Contractor, plus any additional content deemed appropriate by an advisory committee, which would oversee the model. The proposed designation is the Canadian Graduate Builder and Canadian Graduate Renovator (CGB and CGR), which can be obtained by challenging CGB and CGR exams. A Candidate Assessment Review (CAR) exam, which measures knowledge and experience in the five content areas of the business of building (renovating) is proposed in order to allow experienced individuals to challenge the CGB or CGR exam without taking all or some of the regional/provincial courses. The results would identify candidate competencies and deficiencies, and determine training that must be taken to be eligible to challenge the Canadian Graduate Builder (Renovator) exam.

The rationale for developing a pan-Canadian model is as follows:

- The model, based on the National Occupational Analysis, would establish a core level of tasks/skills required by the professional homebuilder.
- The model would present a standard by which individual regional/provincial training efforts could better align their courses to the National OA.
- The development of CGB and CGR exams would offer a means of providing greater consistency in educational initiatives throughout the country. Regions would be able to determine what additional training modules/programs would bring their curriculum into alignment with the National OA. Provincial associations would also have the ability to assess which of their programs extend beyond the reach of the OA.
- Using a CGB and a CGR exam would result in enhanced transportability of accreditation/certification from region to region.
- Builders and renovators would be able to compare their knowledge level (credentials) with that of other builders and renovators across Canada – on a fair and equitable basis.
- Provincial/regional programs would have the confidence that their designations are at least as good as they are in any other region/province of Canada. (This would apply to the CGB and CGR designation only; it does not presume that it is equivalent to other provincial or college designations)
- A harmonized pan-Canadian model would enable builders and renovators to gain CGB or CGR 'recognition', which could be seen as prestigious and valuable to promote in show homes, displays and sales literature.

9.0 Next Steps

Based on the results, the next steps are:

1. Begin the process to develop Canadian Graduate Builder and Canadian Graduate Renovator (CGB and CGR) exams and implement a Candidate Assessment Review (CAR) exam and process.
2. Recognize that the pan-Canadian model not be deemed as a national program but as a common standard that can be voluntarily adopted by provincial organizations.
3. Review the Occupational Analysis for New Home Builder and Residential Renovation Contractor against the CGB and CGR exams to identify gaps, i.e., capture new content not included in the Occupational Analysis, and to clarify its scope and revise accordingly.
4. Develop courses, suitable for use in all areas of Canada, such as the Residential Construction Supervisor (Appendix G).
5. Implement a process whereby an annual updating session could be developed on behalf of the regions/provinces.
6. Set up a discussion to determine whether or not community colleges should be given access to the CGB and CGR exams to support any certification programs that the colleges may decide to create and offer.
7. Set up a discussion regarding the possibility of receiving college credits towards a college diploma by means of the model program.
8. Set up a discussion regarding the possibility of including the competencies of this model program into the single comprehensive skills database for the technicians or the technologists.

APPENDIX A

Course Analyses

SUB-BLOCK	TASK	SUBTASK	Awareness	Knowledge	Skill
A1. Definition of Business Goals					
	1. Establish personal goals				
		1.01 Clarifies the reasons for starting or continuing business			
		1.02 Defines what is to be accomplished			
		1.03 Defines and records achievable and measurable goals for the short and long term			
		1.04 Determines the opportunity costs of investing your money elsewhere			
		1.05 Determines if you are prepared to make the necessary personal sacrifice			
	2. Establishes business goals				
		2.01 Assesses the changing trends and approaches affecting the residential industry			
		2.02 Establishes short - and long - term objectives			
		2.03 Applies personal goals to business goals			
		2.04 Determines financial goals			
		2.05 Determines the desired business image			
		2.06 Develops a business mission statement			
	3. Determines scope of services				
		3.01 Determines type of services being offered in the marketplace			
		3.02 Determines which services are required for the business to reach its objectives			
	4. Determines business approach				
		4.01 Determines the expected size of the business			
		4.02 Determines the form / structure of the business			
		4.03 Determines elements of business operations to be performed in-house and those which will be subcontracted			
		4.04 Determines what tasks to do personally			
A2. Development of Marketing and Sales Plans					
	5. Determines the general market environment				
		5.01 Assesses the market conditions			
		5.02 Identifies market opportunities			
	6. Determines the target market				
		6.01 Determines the needs and wants of the market			
		6.02 Defines which group of purchasers would be interested in the product			
		6.03 Clearly defines which purchaser groups you want to have an interest in your product			
		6.04 Defines the type of people in the industry one wants to work with			
	7. Determines where the business should be positioned				
		7.01 Determines the manner in which the business provides greater value than that of competitors			
		7.02 Decides how target group prospects should perceive your business / product and compare it to others			
		7.03 Gathers feedback from the target group concerning the business position			
	8. Develops a pricing strategy				
		8.01 Determines projected cost of products including mark-up			
		8.02 Determines market prices for comparable products			

Shaded areas indicate the level (awareness, knowledge or skill) that has been met for the tasks/subtasks.

				8.03	Establishes asking price for products, based on business positioning, marketing strategy and margin requirements				
9.	Develops an original strategy for the marketing activities								
			9.01		Decides on the message that you want to convey to the target audience				
			9.02		Identifies techniques to effectively communicate the message to the target market				
			9.03		Creates a unique marketing image that makes your product and business stand out from all others				
10.	Develops a sales strategy for the business								
			10.01		Develops the basic tasks associated with selling				
			10.02		Identifies the advantages and disadvantages between selling yourself, using your staff and using an agent				
			10.03		Determines at what point of the year you will sell your products				
			10.04		Determines the effect upon sales of site presentation and business				
11.	Develops a public relations plan								
			11.01		Demonstrates the importance of public relations				
			11.02		Determines public relations options best suited to your marketing strategy and business positioning				
			11.03		Prepares a public relations plan				
			11.04		Develops a budget for public relations activities				
12.	Determines the marketing tools to be used								
			12.01		Decides on the kind of methods one will use to reach the target groups with the message about the product and business				
			12.02		Determines the amount of money to be allocated to marketing				
			12.03		Determines when each method will be employed and over what time period				
			12.04		Determines the optimum marketing tool for the product / business using cost effectiveness data				
13.	Develops an advertising plan								
			13.01		Assesses objectives				
			13.02		Allocates budget				
			13.03		Develops a monthly advertising plan				
			13.04		Evaluates and selects medium				
			13.05		Develops advertising materials consistent with marketing strategy				
			13.06						
					Develops copy - for letterhead, business cards, advertising, signage and other promotional vehicles - consistent with the corporate image				
			13.07		Selects the market areas and media for placement of advertising				
			13.08		Establishes a purchasing plan				
			13.09		Obtains co-operation and financial support from suppliers				
			13.10		Develops a procedure for tracking results				
14.	Develops a client referral plan								
			14.01		Determines how previous clients can assist in marketing the business				
			14.02		Identifies alternative means of communicating client satisfaction in the business 's product and / or service to the target market				
			14.03		Communicates the client referral plan to the staff, subcontractors and prospective clients				
A3.	Development of a Financial Plan								
			15.		Prepares pro forma income statements				

Shaded areas indicate the level (awareness, knowledge or skill) that has been met for the tasks/subtasks.

			15.01	Projects expected gross revenue from sales of the products and services				
			15.02	Determines the cost of producing the product or providing the service				
			15.03	Estimates the cost of operating the business				
			15.04	Determines the expected net income				
			15.05	Determines the risk involved in working to the projected level				
	16.	Develops pro forma balance sheet	16.01	Identifies all assets of the business				
			16.02	Identifies all liabilities of the business				
			16.03	Determines the shareholder's equity and retained earnings				
	17.	Prepares cash flow estimates	17.01	Determines the timing and amount of payments for goods, services and office operations				
			17.02	Estimates timing of income to be received				
			17.03	Determines the amount of bridge (temporary) financing required to satisfy the expected payment schedule				
	18.	Develops a long-term financial plan	18.01	Estimates future sales possibilities				
			18.02	Determines requirement for capital and establishes plan for acquisition				
			18.03	Assesses the effects of recessions, booms and normal industry cycles				
			18.04	Estimates return on investment				
	19.	Determines required mark-ups	19.01	Determines projected cost of production				
			19.02	Determines projected cost of operating the business				
			19.03	Determines projected business profit				
			19.04	Determines required mark-up of production costs to cover operating costs and desired profit				
			19.05	Alters mark-up based on market conditions				
A4.	Development of an Operating Plan							
	20.	Develops a code of ethics to cover all business operations						
			20.01	Recognizes the importance of ethical standards in relation to long-term reputation				
			20.02	Determines ethical standard for working with employees, subcontractors, prospects and clients				
	21.	Develops a land / property acquisition plan						
			21.01	Determines type of land / property required to support your market position				
			21.02	Determines availability of suitable land / property				
	22.	Develops a design and drafting plan						
			22.01	Determines design and drafting requirements				
			22.02	Assesses computerized design and drafting options				
	23.	Develops an estimating plan						
			23.01	Determines cost estimating methods				
			23.02	Determines a procedure for gathering bids from trades and suppliers				
	24.	Develops a contract administration plan						
			24.01	Establishes change order procedures				
			24.02	Develops a contract package				
			24.03	Explains the major legal requirements of a contract				

Shaded areas indicate the level (awareness, knowledge or skill) that has been met for the tasks/subtasks.

			24.04	Explains the difference between a verbal, a written contract and an interim contract			
		25.	24.05	Develops a quality control plan			
			25.01	Establishes quality standards for the business			
		26.	25.02	Develops inspection procedures			
			26.01	Establishes a philosophy for customer service			
			26.02	Develops customer service policies			
			26.03	Establishes a level of customer service			
		27.	27.01	Reviews waste stream being generated from construction activities			
			27.02	Determines where wastes can be reduced within the project			
			27.03	Determines which materials can be sent to recycling centres			
A5.	Development of a Human Resource Plan						
		28.	28.01	Arranges groups of tasks into job functions			
			28.02	Determines whether work is to be performed by in-house staff or by trade or professional subcontractors			
			28.03	Determines desired staffing complement			
			28.04	Identifies skills required of the key personnel			
			28.05	Plans the long-term approach to skills upgrading			
			28.06	Determines priorities to be used when establishing relationships with company employees, such as: profitability, quality control, business approach and ethics			
		29.		Prepares job descriptions for all employees			
			29.01	Assigns job functions to employees			
			29.02	Determines responsibilities and authority for each job			
		30.		Prepares plans to ensure the business has sufficient skilled human resources			
			30.01	Determines which skills should ideally be provided by employees of the business			
			30.02	Determines the training required to provide the needed skills and knowledge to the owner			
			30.03	Assesses the skills and knowledge that are available through the use of contract labour			
			30.04	Determines how human resources will be acquired			
B1.	Business Management						
		31.		Organizes and equips the business office			
			31.01	Develops an organizational chart			
			31.02	Develops internal office systems			
			31.03	Determines equipment and supplies required			
			31.04	Capitalizes on office equipment and product features to enhance efficiency			
			31.05	Recognizes the type of work for which a computer is most suited in the industry			
			31.06	Decides whether the operation would benefit from the use of a computer			
			31.07	Determines how a computer would be introduced into the business operation			
		32.		Develops clear instructions relating to job functions and tasks being delegated			
			32.01	Defines the task clearly - both what is to be done and why			

Shaded areas indicate the level (awareness, knowledge or skill) that has been met for the tasks/subtasks.

32.02		Determines whether the individual can adequately perform the task		
32.03		Defines clearly the level and limits of authority delegated		
32.04		Provides assistance, as required to ensure that the task will be satisfactorily completed		
32.05		Ensures that problems are clearly communicated		
33.	Assesses value of information required to manage business			
33.01		Decides when, and what, information is required in order to manage the operations of the business		
33.02		Collects the necessary information		
33.03		Organizes the data in a format suitable for analysis		
34.	Uses effective communication skills			
34.01		Speaks clearly and concisely		
34.02		Uses language and terminology appropriate for the audience		
34.03		Develops attitudes that facilitate verbal communications		
34.04		Identifies the reasons for communication breakdowns		
34.05		Provides appropriate feedback		
34.06		Identifies those instances when written communication is most appropriate		
34.07		Determines when verbal communications must be put in writing		
34.08		Writes in a clear, correct and organized manner		
34.09		Evaluates client concerns and provides appropriate response		
35.	Solicits employee input on business operations			
35.01		Be accessible to staff		
35.02		Conducts regular staff meetings		
35.03		Outlines methods for employees to provide feedback		
36.	Demonstrates leadership			
36.01		Implements the process of team building		
36.02		Describes the relationship between the leader and the people		
36.03		Explains the different levels of positive and negative motivation		
36.04		Practices effective motivational skills		
36.05		Emphasizes the personal benefits resulting from achieving expectations		
36.06		Instills the desire to achieve		
37.	Outlines and communicates goal achievement measures			
37.01		States short - and long - term goals and objectives clearly		
37.02		Ensures that the staff are aware of the stated goals and objectives		
37.03		Determines staff responsibilities in relation to attaining the goals		
37.04		Outlines the process to be used in reviewing business progress in relation to the established goals and objectives		
37.05		Identifies critical milestones for attaining goals		
37.06		Indicates the timing for attaining goals and objectives		
38.	Ensures that staff is updated and informed about the operations of the business			
38.01		Keeps staff informed about the operations of the business		
38.02		Provides opportunities for staff to ask questions		
39.	Obtains appropriate business insurance, licences and permits			
39.01		Obtains liability insurance		
39.02		Obtains construction insurance		
39.03		Registers with Workers' Compensation Board (WCB)		
40.	Protects the interests of the business			

			40.01	Ensures that the contract has been understood and agreed to by both parties			
			40.02	States all specifications and steps to be taken clearly			
			40.03	Determines the value of an arbitration clause in the contract			
			40.04	Maintains open lines of communications throughout the project			
			40.05	Documents activities with different projects			
			40.06	Details the steps in seeking a solution to client / contractor problem			
			40.07	Negotiates a fair and mutual settlement			
			40.08	Collects money on time			
B2. Marketing and Sales							
		41. Manages the marketing strategy					
			41.01	States to employees and subcontractors the corporate strategy and ensures they work to the stated level of performance			
			41.02	Assesses the extent to which the individuals functioning within the business reflect the desired image			
			41.03	Assesses the extent of the actual business image to ensure it reflects the desired image			
			41.04	Employs business practices that reflect personal and client sensitivity			
			41.05	Obtains and assesses feedback concerning the image of the business			
		42. Manages the advertising plan					
			42.01	Oversees development and production of advertising materials to ensure consistency of message			
			42.02	Places advertising in selected media as applicable			
			42.03	Evaluates placement costs in relation to marketing budget			
			42.04	Assesses effectiveness of each media in relation to good leads per dollar spent by tracking the prospects			
			42.05	Removes less effective advertising placements			
		43. Manages the public relations plan					
			43.01	Arranges for public relations activities for the business			
			43.02	Provides information to media on business products and activities			
		44. Manages the sales program					
			44.01	Selects and recruits sales personnel to put sales program into effect			
			44.02	Develops sales presentation consistent with market plan			
			44.03	Arranges for training of sales people representing the business			
			44.04	Schedules sales activities			
			44.05	Obtains feedback from sales people relating to market acceptance			
			44.06	Develops and establishes closure procedures and an administrative framework for closing a sale			
			44.07	Ensures that sales staff is informed of production problems			
		45. Manages the client referral plan					
			45.01	Ensures that the job is done right the first time			
			45.02	Requests acknowledgement of client satisfaction (letter of recommendation)			
			45.03	Sends or provides token of appreciation to customers			
			45.04	Revisits existing clients			
			45.05	Obtains permission to use certain projects for demonstration purposes			
			45.06	Lives up to the business's service policy			
		46. Qualifies the prospect					
			46.01	Determines if the type of work proposed suits and is of interest to the business			
			46.02	Determines the seriousness and commitment of the customer			
			46.03	Assesses the competition for the project			

			46.04	Evaluates the time frame of the proposed work and ensures that the schedule can accommodate it			
	47.	Assesses prospect expectations and needs	46.05	Determines the customer's ability to pay			
			47.01	Develops a questionnaire in advance of sales calls designed to elicit information about client needs and expectations			
			47.02	Arranges the time and place for a meeting			
			47.03	Develops a method to obtain answers to questionnaire			
			47.04	Listens to and records customer input			
	48.	Develops sales and / or exit strategies	48.01	Assesses client			
			48.02	Prepares sales presentation			
			48.03	Uses effective closing techniques			
	49.	Obtains client commitment / contract	49.01	Presents a proposal of work to be performed			
			49.02	Discusses details of the proposal with customer			
			49.03	Overcomes objectives that customers might have			
			49.04	Closes the deal and puts in place the mechanism to obtain signed contract			
			49.05	Accepts deposit			
B3.	Financial Management						
	50.	Establishes and maintains an accounting system that can be easily related to industry projects	50.01	Chooses an accountant who is familiar with the industry			
			50.02	Establishes accounting procedures which provide information for each project			
			50.03	Establishes accounting procedures which distinguish between fixed and variable overhead costs			
			50.04	Establishes accounting procedures which allow for regular and ongoing review			
			50.05	Explains the basic accounting principles associated with accounts receivable and payable			
			50.06	Maintains the appropriate documentation for accounts receivable and payable			
			50.07	Maintains a system that compares accounts receivable to accounts payable and cash flow			
			50.08	Establishes and maintains collection procedures for accounts receivable			
			50.09	Develops a system to ensure that accounts are paid within the terms outlined in credit agreements			
	51.	Interprets financial statements and reports					
			51.01	Identifies the source of financial statements within the business			
			51.02	Interprets the contents of the balance sheet			
			51.03	Explains the different components of a balance sheet			
			51.04	Explains the concepts of assets and liabilities			
			51.05	Interprets profit and loss statements			
			51.06	Reads and interprets earned surplus or retained earnings statement			
			51.07	Explains some of the basic ratios associated with interpreting financial statement, such as working capital ratio and interest coverage ratio			
	52.	Establishes required financing					

			52.01	Identifies the services and lending limits of banks, mortgage companies, mortgage brokers, credit unions and trust companies			
			52.02	Establishes an effective working relationship with account managers by keeping them informed of progress on specific projects and business in general			
53.	Negotiates payment terms with suppliers, subcontractors and developers		53.01	Determines normal credit arrangements			
			53.02	Negotiates new credit arrangements			
54.	Sets up and uses a system to control costs at all levels of the business operations		54.01	Implements a system for material purchases			
			54.02	Develops a system for field verification of materials and labour bills			
			54.03	Establishes and works within an approved budget			
55.	Sets up system to control cash flow		55.01	Explains the purpose of a cash flow system			
			55.02	Predicts job costs and identifies points in time where cash resources will be required			
			55.03	Monitors and updates cash flow projections on a regular basis			
			55.04	Establishes lines of credit with different financial institutions			
56.	Establishes and maintains a system for project cost control		56.01	Explains the concept of project cost control			
			56.02	Maintains accurate project costing records, including labour, materials, subcontractors, etc.			
			56.03	Compares actual project costs to budget figures			
			56.04	Makes necessary adjustments to future job estimates as required			
			56.05	Implements a purchase order system or puts in place alternatives to verify that supplier and subcontractor invoices correspond to goods and services			
			56.06	Maintains control over expenditures and productivity on the job site			
57.	Establishes effective purchasing practices		57.01	Develops a needs list by category and alternatives			
			57.02	Investigates all sources of supply			
			57.03	Requests quotations and terms			
			57.04	Compares quotes			
			57.05	Reviews previous pricing			
			57.06	Makes buying decision			
			57.07	Documents purchases (issues P.O.'s)			
B4.	Human Resource Management						
			58.	Determines salary, benefits and incentive packages			
			58.01	Determines base salary rates for each job function - commensurates with duties and responsibilities performed			
			58.02	Determines benefits package to be provided			
			58.03	Holds regular reviews and performance ratings and adjusts salary accordingly			
			58.04	Offers additional bonus and incentive package such as a profit sharing plan			
59.	Adopts effective recruiting practices		59.01	Evaluates the skill level required for a given job			
			59.02	Fills vacant positions			

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			59.03	Explains the salary and compensation package to employees		
			59.04	Describes the remittance requirements		
			59.05	Abides by legislation governing employees in the workplace		
			59.06	Abides by the terms of collective agreements as applicable		
	60.	Recognizes the strengths and limitations of employees and assigns them work accordingly				
			60.01	Assesses employee skills and knowledge		
			60.02	Assigns work that challenges employees to their best		
	61.	Provides clear instructions when assigning tasks				
			61.01	Defines the tasks to be performed clearly		
			61.02	Sets up a time schedule		
			61.03	Delegates a task		
	62.	Prepares evaluation criteria for employee performance				
			62.01	Develops rating system for scoring		
			62.02	Sets time periods for evaluations		
			62.03	Explains requirements to employees		
			62.04	Ties remuneration increase to a promotion as a reward		
	63.	Provides skills development and educational upgrading for all employees				
			63.01	Identifies career path opportunities for employees		
			63.02	Provides training for new employees or employees being phased into new jobs, ensuring that their performance meet the requirements		
			63.03	Identifies the role of training in phasing employees into positions of increasing responsibility		
			63.04	Determines skills upgrading requirements		
			63.05	Provides skills development and educational upgrading as a means of improving productivity and profitability		
			63.06	Establishes and maintains a skills development schedule		
			63.07	Allows employees to understand the operation and functions of the various parts of the business		
			63.08	Identifies appropriate skills development vehicles and knowledge upgrading programs		
			63.09	Encourages and makes arrangements for staff and self-attendance at courses and seminars		
			63.10	Evaluates benefits resulting from sending employees to upgrading programs		
	B5.	Project Management				
			64.	Ensures construction conforms to current codes and standards		
			64.01	Acquires the latest version of the Building Code		
			64.02	Attends code related training programs		
			64.03	Ensures all plans and specifications comply with codes		
			64.04	Ensures field staff are knowledgeable of codes and standards		
	65.	Keeps up-to-date with new products and building processes				
			65.01	Acquires information on products at shows		
			65.02	Subscribes to product and building magazines		
			65.03	Attends conference and meetings		
			65.04	Evaluates new products and discusses their application with suppliers and installers		
	66.	Demonstrates how building components work together as a system				

			66.01	Inspects building thoroughly			
			66.02	Identifies the different components of a building			
			66.03	Assesses the impact of renovation activity on the system			
	67.	Develops solutions to problems which result from building activities					
			67.01	Defines and exposes the problem			
			67.02	Develops and decides on the best possible solution			
			67.03	Maintains a rational perspective			
	68.	Performs thorough site investigation, checks on zoning and ensures all required permits are in place					
			68.01	Investigates site for irregularities			
			68.02	Ensures all construction related permits are in place			
	69.	Perform thorough house inspections					
			69.01	Inspects existing house systems			
			69.02	Investigates the parts of the house that will be affected by the proposed renovation			
	70.	Prepares designs, plans and specifications					
			70.01	Represents the design in plans and specifications			
			70.02	Reviews plans and specifications with the customer for approval prior to construction			
	71.	Estimates accurately all costs of the project					
			71.01	Employs a standard format for estimating project costs, ensuring that the format is detailed			
			71.02	Checks estimate to ensure that all hard and soft costs have been accounted for			
			71.03	Updates base costs on an ongoing basis			
			71.04	Provides cash allowances if and when specifications have not been adequately detailed or chosen by the home owner			
			71.05	Allows for a contingency as a means of protecting profit margin			
	72.	Prepares clear documentation for the bidding and tendering process					
			72.01	Prepares bid packages			
			72.02	Provides bid instructions for subcontractors and suppliers			
			72.03	Prepares clear and accurate documents for tenders			
	73.	Complies with contractual requirements					
			73.01	Identifies the major legal requirements of a contract			
			73.02	Identifies the difference between a verbal, a written contract and an interim contract			
			73.03	Ensures that all pages of a contract, plans and specifications are signed and initialed			
			73.04	Identifies addenda to contracts			
			73.05	Identifies those circumstances when it would be appropriate to use a lawyer			
			73.06	Utilizes the appropriate contract for a variety of conditions			
			73.07	Complies with standard clauses of a sales contract			
	74.	Prepares clear documentation to ensure an effective bidding and tendering process for subcontractors and suppliers					
			74.01	Prepares tender packages			
			74.02	Provides bid instructions for subcontractors and suppliers			
	75.	Prepares contracts to hire subcontractors and suppliers					

			75.01	Ensures contracts reflect terms for supply of goods and / or services to be supplied to site	
			75.02	Includes terms of payment for supply of materials and / or labour	
			75.03	Describes penalties for non-performance	
	76.	Plans and schedules the project	76.01	Describes the principles of project scheduling	
			76.02	Identifies the steps required to define and complete a job	
			76.03	Schedules project activities with project financing	
			76.04	Ensures materials can be obtained at the required time	
			76.05	Ensures work is scheduled to allow for inspections to be completed prior to the commencing of the next phase	
			76.06	Develops reporting mechanisms to determine project progress in accordance with plan	
	77.	Arranges contingency plans to deal with potential problems			
			77.01	Describes the resources available to solve problems that arise during construction	
			77.02	Maintains contingency time in the schedule for problem resolution	
	78.	Establishes and maintains an effective working relationship with the clients			
			78.01	Outlines clearly the business's policies and procedures	
			78.02	Explains to your customers the extent and limitations of your business's warranty program	
			78.03	Explains product features and responds to questions	
			78.04	Ensures clients are kept informed of the work in progress	
			78.05	Sets up regular job site meetings to ensure ongoing communication	
			78.06	Trains staff and subcontractors if need arises	
	79.	Addresses and resolves client problems an concerns			
			79.01	Maintains open lines of communication	
			79.02	Shows empathy for client concerns and responds quickly	
			79.03	Responds to clients concerns and complaints honestly and diplomatically	
			79.04	Corrects the problem immediately whenever possible	
	80.	Provides after-sales service			
			80.01	Confirms and documents the business's service policy	
			80.02	Thanks client at job completion	
			80.03	Provides customer with warranty certificate	
			80.04	Responds to problems graciously and promptly	
	B6.	Project Supervision			
			81.	Checks plans for errors and omissions	
			81.01	Reviews plans and specifications for irregularities or incompleteness	
			81.02	Implements necessary corrections	
	82.	Explains plans and schedules to all site personnel and to the client			
			82.01	Informs all site personnel of the construction schedule	
			82.02	Describes the construction schedule to the client	
	83.	Arranges for and acquires all required materials and labour			
			83.01	Places orders with suppliers and subcontractors	
			83.02	Hires required field employees	
	84.	Performs site inspections to monitor job progress and compliance with plans and specifications			

85.	Supervises activities on the site to make certain they are being performed to business standards	84.01	Arranges for mandatory inspections as required		
		84.02	Ensures regular staff inspections are conducted as required		
		84.03	Informs staff when inspections will be conducted		
		85.01	Practices good supervisory skills		
		85.02	Informs trades when slippage is occurring on a project schedule so that they can reschedule other work during the interim		
		85.03	Maintains effective communication links between all site personnel and trades		
		85.04	Demonstrates sensitivity to workers' morale and general concerns		
		85.05	Completes all paperwork associated with work on site		
		85.06	Completes all change orders for a contract		
		85.07	Ensures work site is kept neat, tidy and safe		
		85.08	Ensures work being performed by the subtrades is technically competent and recognizes when substandard work is being done		
		85.09	Ensures level of quality is in line with business policy at all stages of production		
86.	Implements procedures for controlling site activity				
		86.01	Educates employees on business policy		
		86.02	Reinforces and re-evaluates policy continually		
		86.03	Makes decisions based on business policy		
		86.04	Provides rationale for policies		
		86.05	Uses purchase order systems		
		86.06	Maintains labour and subtrade reports (scheduling and financial)		
		86.07	Monitors progress and compares to original schedule		
		86.08	Tracks materials not being used		
87.	Enforces safe working conditions	87.01	Complies with the requirements of Workplace Hazardous Material Information System (WHMIS)		
		87.02	Complies with the requirements of the Occupational Health and Safety Act		
88.	Participates in project cost control				
		88.01	Implements cost control procedures		
		88.02	Ensures accurate records are maintained		
B7. Client Relations					
		89.01	Outlines clearly the business's policies and procedures		
		89.02	Explains to customers extent and limitations of business's warranty program		
		89.03	Includes clients in initial and ongoing inspections		
		89.04	Explains product features and responds to questions		
		89.05	Prepares clients for a temporary lifestyle change and inconveniences resulting from extensive renovation		
		89.06	Explains job flow procedures and reason for "dead days" (no worker on site)		
90.	Addresses issue of client accountability				
		90.01	Confirms mutual responsibilities during the job		
		90.02	Initiates an after-sales service program for product / services		
C1. Monitoring and Evaluation of Objectives					
91.	Evaluates whether personal goals are being achieved				
		91.01	Identifies which personal goals are of the greatest importance		

			91.02	Gathers business performance information related to associated business goals			
		92.	91.03	Assesses whether a business objectives are being met	Assesses degree to which goals are being met		
			92.01		Gathers relevant information regarding stated business goals		
			92.02		Compares estimated performance with actual performance		
		93.	93.01	Determines if services being offered are appropriate	Assesses where income is being generated		
			93.02		Identifies specific services offered by business to customers		
			93.03		Compares income generation to services offered		
		94.	94.01	Assesses the approach to business	Determines if time spent by one's self is reasonable and useful		
			94.02		Considers alternative staffing arrangements		
			94.03		Assesses one's self in relation to business growth and advancement		
	C2. Monitoring and Evaluation of Marketing and Sales Plans						
		95.		Determines why prospects came to the business			
			95.01		Develops procedures for tracking prospects		
			95.02		Records responses in a prescribed standard format		
			95.03		Assesses survey results and matches findings to marketing initiatives		
		96.		Determines why prospects purchased or did not purchase the product			
			96.01		Conducts ongoing evaluation with prospects and customers regarding the purchase decision		
			96.02		Identifies problems with unpopular products		
		93.		Reviews market situations / realities			
			97.01		Prepares detailed project reports covering a one-to-two year period		
			97.02		Determines total sales in the marketplace with total projects sold by the business		
			97.03		Compares sales volume with historical records on a month-to-month basis and by category		
			97.04		Determines actual selling prices throughout the marketplace		
			97.05		Develops criteria to compare similar jobs		
			97.06		Reviews economic indicators on interest rates, job creation and market expansions / contractions		
		98.		Compares monthly sales volume with projected sales volume and determines reasons for variances			
			98.01		Gathers accurate monthly sales reports		
			98.02		Compares actual sales to estimated sales		
		99.		Determines sales coming from target market			
			99.01		Prepares customer profiles for each product sold		
			99.02		Establishes ratio of estimates to sales		
			99.03		Develops a category analysis (breakdown by job category)		
			99.04		Confirms the profile of the planned target market		
		100.		Determines sales resulting from client referral plan			
			100.01		Determines how customers came to your business		
			100.02		Identifies customers referred to business by other customers		

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				101. Determines whether business is positioned as planned	101.01	Collects information from prospects and customers on their perception of the business							
					101.02	Gathers information from trades, staff and professionals regarding their perception of the business							
C3. Monitoring and Evaluation of the Financial Plan													
				102. Reviews financial reports	102.01	Reviews and assesses monthly statements							
					102.02	Ensures that the financial reports are accurate and reflect the true situation (i.e., accrual basis)							
					102.03	Evaluates business performance							
				103. Compares financial reports against budget expectations	103.01	Gets current (actual), timely data							
					103.02	Compares the actual financial report to the original budget for variances							
					103.03	Analyzes variances							
					103.04	Develops and executes an action plan							
				104. Prepares final report on each project	104.01	Sets up a system to track job costs							
					104.02	Documents the cost estimate for a project and compares it to the actual cost upon completion							
					104.03	Calculates business's profit or loss on a project as a percentage							
					104.04	Determines ways to reduce variances in future projects							
				105. Compares actual margins with expected margins	105.01	Monitors job cost control system on a continual basis							
					105.02	Reviews monthly financial statements							
					105.03	Reviews cost reports on each project							
				106. Evaluates requirements for cash flow and capital	106.01	Monitors payables versus receivables							
					106.02	Establishes cash flow requirements							
					106.03	Satisfies cash flow requirements							
					106.04	Compares actual capital requirements to original estimate							
C4. Monitoring and Evaluation of the Operating Plan													
				107. Monitors operating performance indicators	107.01	Collects information on employee performance and production efficiencies							
					107.02	Collects information on sales and financial indicators							
				108. Monitors type and frequency of customer complaints	108.01	Develops a centralized record system for logging complaints by job and by stage of work							
					108.02	Develops a system for reporting complaints received, action taken and results achieved on a regular basis							
					108.03	Assesses ability of the business to respond to customer complaints							
				109. Monitors the effectiveness of problem solving	109.01	Assesses number of problems identified in the business from all areas							

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			109.02	Assesses the number of complaints directed at the quality of work performed			
			109.03	Analyzes complaints to identify causes of most common complaints Determines if response and solution to problems are acceptable			
		110. Develops options for improving business performance	109.04				
			110.01	Assesses the business's performance in relation to goals and objectives Determines those areas which are in need of improvement			
			110.02				
			110.03	Consults with staff to explore options to improve business performance Lists the options which are available for improving business performance			
			110.04				
		111. Assesses options and modifies plans	111.01	Assesses existing business plan in relation to its suitability for the next business cycle Assesses options for modifying plans Revises or modifies existing business plan or prepares new business plan			
			111.02				
			111.03				
		112. Revises procedures	112.01	Implements new procedures consistent with the revised plan			
			112.02	Communicates new systems and procedures with employees and subcontractors			
			112.03	Monitors implementation of the new procedures			
C5. Monitoring and Evaluation of Human Resources							
		113. Assesses performance of employees	113.01	Evaluates productivity of employees in performing their job			
			113.02	Evaluates how employees work with their peers			
			113.03	Evaluates employees' performance in relation to the client and trades Conducts performance review meeting with the employees			
		114. Compares staff salaries with industry / market standards	113.04				
			114.01	Determines industry standards for salaries for various job categories			
			114.02	Determines the comparable salary to pay when including benefits package			
			114.03	Compares the value of the work performed by the employees in relation to industry standards			
		115. Determines effectiveness of training initiatives					
			115.01	Identifies training activities conducted			
			115.02	Describes expected results from training			
			115.03	Determines employees perspective on training initiatives			
			115.04	Identifies additional training requirements			

SUB-BLOCK	TASK	SUBTASK	Awareness	Knowledge	Skill
A1. Definition of Business Goals					
	1. Establish personal goals				
		1.01 Clarifies the reasons for starting or continuing business			
		1.02 Defines what is to be accomplished			
		1.03 Defines and records achievable and measurable goals for the short and long term			
		1.04 Determines the opportunity costs of investing your money elsewhere			
		1.05 Determines if you are prepared to make the necessary personal sacrifice			
	2. Establishes business goals				
		2.01 Assesses the changing trends and approaches affecting the residential industry			
		2.02 Establishes short - and long - term objectives			
		2.03 Applies personal goals to business goals			
		2.04 Determines financial goals			
		2.05 Determines the desired business image			
		2.06 Develops a business mission statement			
	3. Determines scope of services				
		3.01 Determines type of services being offered in the marketplace			
		3.02 Determines which services are required for the business to reach its objectives			
	4. Determines business approach				
		4.01 Determines the expected size of the business			
		4.02 Determines the form / structure of the business			
		4.03 Determines elements of business operations to be performed in-house and those which will be subcontracted			
		4.04 Determines what tasks to do personally			
A2. Development of Marketing and Sales Plans					
	5. Determines the general market environment				
		5.01 Assesses the market conditions			
		5.02 Identifies market opportunities			
	6. Determines the target market				
		6.01 Determines the needs and wants of the market			
		6.02 Defines which group of purchasers would be interested in the product			
		6.03 Clearly defines which purchaser groups you want to have an interest in your product			
		6.04 Defines the type of people in the industry one wants to work with			
	7. Determines where the business should be positioned				
		7.01 Determines the manner in which the business provides greater value than that of competitors			
		7.02 Decides how target group prospects should perceive your business / product and compare it to others			
		7.03 Gathers feedback from the target group concerning the business position			
	8. Develops a pricing strategy				
		8.01 Determines projected cost of products including mark-up			
		8.02 Determines market prices for comparable products			

Shaded areas indicate the level (awareness, knowledge or skill) that has been met for the tasks/subtasks.

9.	Develops an original strategy for the marketing activities		8.03	Establishes asking price for products, based on business positioning, marketing strategy and margin requirements					
			9.01	Decides on the message that you want to convey to the target audience					
			9.02	Identifies techniques to effectively communicate the message to the target market					
			9.03	Creates a unique marketing image that makes your product and business stand out from all others					
10.	Develops a sales strategy for the business		10.01	Develops the basic tasks associated with selling					
			10.02	Identifies the advantages and disadvantages between selling yourself, using your staff and using an agent					
			10.03	Determines at what point of the year you will sell your products					
			10.04	Determines the effect upon sales of site presentation and business					
11.	Develops a public relations plan		11.01	Demonstrates the importance of public relations					
			11.02	Determines public relations options best suited to your marketing strategy and business positioning					
			11.03	Prepares a public relations plan					
			11.04	Develops a budget for public relations activities					
12.	Determines the marketing tools to be used		12.01	Decides on the kind of methods one will use to reach the target groups with the message about the product and business					
			12.02	Determines the amount of money to be allocated to marketing					
			12.03	Determines when each method will be employed and over what time period					
			12.04	Determines the optimum marketing tool for the product / business using cost effectiveness data					
13.	Develops an advertising plan		13.01	Assesses objectives					
			13.02	Allocates budget					
			13.03	Develops a monthly advertising plan					
			13.04	Evaluates and selects medium					
			13.05	Develops advertising materials consistent with marketing strategy					
			13.06	Develops copy - for letterhead, business cards, advertising, signage and other promotional vehicles - consistent with the corporate image					
			13.07	Selects the market areas and media for placement of advertising					
			13.08	Establishes a purchasing plan					
			13.09	Obtains co-operation and financial support from suppliers					
			13.10	Develops a procedure for tracking results					
14.	Develops a client referral plan		14.01	Determines how previous clients can assist in marketing the business					
			14.02	Identifies alternative means of communicating client satisfaction in the business's product and / or service to the target market					
			14.03	Communicates the client referral plan to the staff, subcontractors and prospective clients					
A3.	Development of a Financial Plan								
			15.	Prepares pro forma income statements					

Shaded areas indicate the level (awareness, knowledge or skill) that has been met for the tasks/subtasks.

			15.01	Projects expected gross revenue from sales of the products and services			
			15.02	Determines the cost of producing the product or providing the service			
			15.03	Estimates the cost of operating the business			
			15.04	Determines the expected net income			
			15.05	Determines the risk involved in working to the projected level			
	16.	Develops pro forma balance sheet	16.01	Identifies all assets of the business			
			16.02	Identifies all liabilities of the business			
			16.03	Determines the shareholder's equity and retained earnings			
	17.	Prepares cash flow estimates	17.01	Determines the timing and amount of payments for goods, services and office operations			
			17.02	Estimates timing of income to be received			
			17.03	Determines the amount of bridge (temporary) financing required to satisfy the expected payment schedule			
	18.	Develops a long-term financial plan	18.01	Estimates future sales possibilities			
			18.02	Determines requirement for capital and establishes plan for acquisition			
			18.03	Assesses the effects of recessions, booms and normal industry cycles			
			18.04	Estimates return on investment			
	19.	Determines required mark-ups	19.01	Determines projected cost of production			
			19.02	Determines projected cost of operating the business			
			19.03	Determines projected business profit			
			19.04	Determines required mark-up of production costs to cover operating costs and desired profit			
			19.05	Alters mark-up based on market conditions			
A4.	Development of an Operating Plan						
	20.	Develops a code of ethics to cover all business operations					
			20.01	Recognizes the importance of ethical standards in relation to long-term reputation			
			20.02	Determines ethical standard for working with employees, subcontractors, prospects and clients			
	21.	Develops a land / property acquisition plan	21.01	Determines type of land / property required to support your market position			
			21.02	Determines availability of suitable land / property			
	22.	Develops a design and drafting plan	22.01	Determines design and drafting requirements			
			22.02	Assesses computerized design and drafting options			
	23.	Develops an estimating plan	23.01	Determines cost estimating methods			
			23.02	Determines a procedure for gathering bids from trades and suppliers			
	24.	Develops a contract administration plan					
			24.01	Establishes change order procedures			
			24.02	Develops a contract package			
			24.03	Explains the major legal requirements of a contract			

			24.04	Explains the difference between a verbal, a written contract and an interim contract			
			24.05	Signs and initials all pages of a contract, plans and specifications			
	25.	Develops a quality control plan	25.01	Establishes quality standards for the business			
			25.02	Develops inspection procedures			
	26.	Develops a customer service program	26.01	Establishes a philosophy for customer service			
			26.02	Develops customer service policies			
			26.03	Establishes a level of customer service			
	27.	Develops a waste management plan	27.01	Reviews waste stream being generated from construction activities			
			27.02	Determines where wastes can be reduced within the project			
			27.03	Determines which materials can be sent to recycling centres			
A5.	Development of a Human Resource Plan						
	28.	Determines the human resource needs	28.01	Arranges groups of tasks into job functions			
			28.02	Determines whether work is to be performed by in-house staff or by trade or professional subcontractors			
			28.03	Determines desired staffing complement			
			28.04	Identifies skills required of the key personnel			
			28.05	Plans the long-term approach to skills upgrading			
			28.06	Determines priorities to be used when establishing relationships with company employees, such as: profitability, quality control, business approach and ethics			
	29.	Prepares job descriptions for all employees	29.01	Assigns job functions to employees			
			29.02	Determines responsibilities and authority for each job			
	30.	Prepares plans to ensure the business has sufficient skilled human resources	30.01	Determines which skills should ideally be provided by employees of the business			
			30.02	Determines the training required to provide the needed skills and knowledge to the owner			
			30.03	Assesses the skills and knowledge that are available through the use of contract labour			
			30.04	Determines how human resources will be acquired			
B1.	Business Management						
	31.	Organizes and equips the business office					
			31.01	Develops an organizational chart			
			31.02	Develops internal office systems			
			31.03	Determines equipment and supplies required			
			31.04	Capitalizes on office equipment and product features to enhance efficiency			
			31.05	Recognizes the type of work for which a computer is most suited in the industry			
			31.06	Decides whether the operation would benefit from the use of a computer			
			31.07	Determines how a computer would be introduced into the business operation			
	32.	Develops clear instructions relating to job functions and tasks being delegated					
			32.01	Defines the task clearly - both what is to be done and why			

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			32.02	Determines whether the individual can adequately perform the task		
			32.03	Defines clearly the level and limits of authority delegated		
			32.04	Provides assistance, as required to ensure that the task will be satisfactorily completed		
			32.05	Ensures that problems are clearly communicated		
			33.01	Decides when, and what, information is required in order to manage the operations of the business		
			33.02	Collects the necessary information		
			33.03	Organizes the data in a format suitable for analysis		
			34.01	Speaks clearly and concisely		
			34.02	Uses language and terminology appropriate for the audience		
			34.03	Develops attitudes that facilitate verbal communications		
			34.04	Identifies the reasons for communication breakdowns		
			34.05	Provides appropriate feedback		
			34.06	Identifies those instances when written communication is most appropriate		
			34.07	Determines when verbal communications must be put in writing		
			34.08	Writes in a clear, correct and organized manner		
			34.09	Evaluates client concerns and provides appropriate response		
			35.01	Be accessible to staff		
			35.02	Conducts regular staff meetings		
			35.03	Outlines methods for employees to provide feedback		
			36.01	Implements the process of team building		
			36.02	Describes the relationship between the leader and the people		
			36.03	Explains the different levels of positive and negative motivation		
			36.04	Practices effective motivational skills		
			36.05	Emphasizes the personal benefits resulting from achieving expectations		
			36.06	Instills the desire to achieve		
			37.01	States short - and long - term goals and objectives clearly		
			37.02	Ensures that the staff are aware of the stated goals and objectives		
			37.03	Determines staff responsibilities in relation to attaining the goals		
			37.04	Outlines the process to be used in reviewing business progress in relation to the established goals and objectives		
			37.05	Identifies critical milestones for attaining goals		
			37.06	Indicates the timing for attaining goals and objectives		
			38.01	Keeps staff informed about the operations of the business		
			38.02	Provides opportunities for staff to ask questions		
			39.01	Obtains liability insurance		
			39.02	Obtains construction insurance		
			39.03	Registers with Workers' Compensation Board (WCB)		
			40.	Protects the interests of the business		

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			40.01	Ensures that the contract has been understood and agreed to by both parties			
			40.02	States all specifications and steps to be taken clearly			
			40.03	Determines the value of an arbitration clause in the contract			
			40.04	Maintains open lines of communications throughout the project			
			40.05	Documents activities with different projects			
			40.06	Details the steps in seeking a solution to client / contractor problem			
			40.07	Negotiates a fair and mutual settlement			
			40.08	Collects money on time			
B2. Marketing and Sales							
		41. Manages the marketing strategy					
			41.01	States to employees and subcontractors the corporate strategy and ensures they work to the stated level of performance			
			41.02	Assesses the extent to which the individuals functioning within the business reflect the desired image			
			41.03	Assesses the extent of the actual business image to ensure it reflects the desired image			
			41.04	Employs business practices that reflect personal and client sensitivity			
			41.05	Obtains and assesses feedback concerning the image of the business			
		42. Manages the advertising plan					
			42.01	Oversees development and production of advertising materials to ensure consistency of message			
			42.02	Places advertising in selected media as applicable			
			42.03	Evaluates placement costs in relation to marketing budget			
			42.04	Assesses effectiveness of each media in relation to good leads per dollar spent by tracking the prospects			
			42.05	Removes less effective advertising placements			
		43. Manages the public relations plan					
			43.01	Arranges for public relations activities for the business			
			43.02	Provides information to media on business products and activities			
		44. Manages the sales program					
			44.01	Selects and recruits sales personnel to put sales program into effect			
			44.02	Develops sales presentation consistent with market plan			
			44.03	Arranges for training of sales people representing the business			
			44.04	Schedules sales activities			
			44.05	Obtains feedback from sales people relating to market acceptance			
			44.06	Develops and establishes closure procedures and an administrative framework for closing a sale			
			44.07	Ensures that sales staff is informed of production problems			
		45. Manages the client referral plan					
			45.01	Ensures that the job is done right the first time			
			45.02	Requests acknowledgement of client satisfaction (letter of recommendation)			
			45.03	Sends or provides token of appreciation to customers			
			45.04	Revisits existing clients			
			45.05	Obtains permission to use certain projects for demonstration purposes			
			45.06	Lives up to the business's service policy			
		46. Qualifies the prospect					
			46.01	Determines if the type of work proposed suits and is of interest to the business			
			46.02	Determines the seriousness and commitment of the customer			
			46.03	Assesses the competition for the project			

	47.	Assesses prospect expectations and needs	46.04	Evaluates the time frame of the proposed work and ensures that the schedule can accommodate it					
			46.05	Determines the customer's ability to pay					
			47.01	Develops a questionnaire in advance of sales calls designed to elicit information about client needs and expectations					
			47.02	Arranges the time and place for a meeting					
			47.03	Develops a method to obtain answers to questionnaire					
			47.04	Listens to and records customer input					
	48.	Develops sales and / or exit strategies	48.01	Assesses client					
			48.02	Prepares sales presentation					
			48.03	Uses effective closing techniques					
	49.	Obtains client commitment / contract	49.01	Presents a proposal of work to be performed					
			49.02	Discusses details of the proposal with customer					
			49.03	Overcomes objectives that customers might have					
			49.04	Closes the deal and puts in place the mechanism to obtain signed contract					
			49.05	Accepts deposit					
B3.	Financial Management								
	50.	Establishes and maintains an accounting system that can be easily related to industry projects							
			50.01	Chooses an accountant who is familiar with the industry					
			50.02	Establishes accounting procedures which provide information for each project					
			50.03	Establishes accounting procedures which distinguish between fixed and variable overhead costs					
			50.04	Establishes accounting procedures which allow for regular and ongoing review					
			50.05	Explains the basic accounting principles associated with accounts receivable and payable					
			50.06	Maintains the appropriate documentation for accounts receivable and payable					
			50.07	Maintains a system that compares accounts receivable to accounts payable and cash flow					
			50.08	Establishes and maintains collection procedures for accounts receivable					
			50.09	Develops a system to ensure that accounts are paid within the terms outlined in credit agreements					
	51.	Interprets financial statements and reports							
			51.01	Identifies the source of financial statements within the business					
			51.02	Interprets the contents of the balance sheet					
			51.03	Explains the different components of a balance sheet					
			51.04	Explains the concepts of assets and liabilities					
			51.05	Interprets profit and loss statements					
			51.06	Reads and interprets earned surplus or retained earnings statement					
			51.07	Explains some of the basic ratios associated with interpreting financial statement, such as working capital ratio and interest coverage ratio					
	52.	Establishes required financing							

			52.01	Identifies the services and lending limits of banks, mortgage companies, mortgage brokers, credit unions and trust companies			
			52.02	Establishes an effective working relationship with account managers by keeping them informed of progress on specific projects and business in general			
	53.	Negotiates payment terms with suppliers, subcontractors and developers					
			53.01	Determines normal credit arrangements			
			53.02	Negotiates new credit arrangements			
	54.	Sets up and uses a system to control costs at all levels of the business operations					
			54.01	Implements a system for material purchases			
			54.02	Develops a system for field verification of materials and labour bills			
			54.03	Establishes and works within an approved budget			
	55.	Sets up system to control cash flow					
			55.01	Explains the purpose of a cash flow system			
			55.02	Predicts job costs and identifies points in time where cash resources will be required			
			55.03	Monitors and updates cash flow projections on a regular basis			
			55.04	Establishes lines of credit with different financial institutions			
	56.	Establishes and maintains a system for project cost control					
			56.01	Explains the concept of project cost control			
			56.02	Maintains accurate project costing records, including labour, materials, subcontractors, etc.			
			56.03	Compares actual project costs to budget figures			
			56.04	Makes necessary adjustments to future job estimates as required			
			56.05	Implements a purchase order system or puts in place alternatives to verify that supplier and subcontractor invoices correspond to goods and services			
			56.06	Maintains control over expenditures and productivity on the job site			
	57.	Establishes effective purchasing practices					
			57.01	Develops a needs list by category and alternatives			
			57.02	Investigates all sources of supply			
			57.03	Requests quotations and terms			
			57.04	Compares quotes			
			57.05	Reviews previous pricing			
			57.06	Makes buying decision			
			57.07	Documents purchases (issues P.O.'s)			
B4.	Human Resource Management						
	58.	Determines salary, benefits and incentive packages					
			58.01	Determines base salary rates for each job function - commensurates with duties and responsibilities performed			
			58.02	Determines benefits package to be provided			
			58.03	Holds regular reviews and performance ratings and adjusts salary accordingly			
			58.04	Offers additional bonus and incentive package such as a profit sharing plan			
	59.	Adopts effective recruiting practices					
			59.01	Evaluates the skill level required for a given job			
			59.02	Fills vacant positions			

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			59.03 Explains the salary and compensation package to employees		
			59.04 Describes the remittance requirements		
			59.05 Abides by legislation governing employees in the workplace		
			59.06 Abides by the terms of collective agreements as applicable		
	60.	Recognizes the strengths and limitations of employees and assigns them work accordingly			
			60.01 Assesses employee skills and knowledge		
			60.02 Assigns work that challenges employees to do their best		
	61.	Provides clear instructions when assigning tasks			
			61.01 Defines the tasks to be performed clearly		
			61.02 Sets up a time schedule		
			61.03 Delegates a task		
	62.	Prepares evaluation criteria for employee performance			
			62.01 Develops rating system for scoring		
			62.02 Sets time periods for evaluations		
			62.03 Explains requirements to employees		
			62.04 Ties remuneration increase to a promotion as a reward		
	63.	Provides skills development and educational upgrading for all employees			
			63.01 Identifies career path opportunities for employees		
			63.02 Provides training for new employees or employees being phased into new jobs, ensuring that their performance meet the requirements		
			63.03 Identifies the role of training in phasing employees into positions of increasing responsibility		
			63.04 Determines skills upgrading requirements		
			63.05 Provides skills development and educational upgrading as a means of improving productivity and profitability		
			63.06 Establishes and maintains a skills development schedule		
			63.07 Allows employees to understand the operation and functions of the various parts of the business		
			63.08 Identifies appropriate skills development vehicles and knowledge upgrading programs		
			63.09 Encourages and makes arrangements for staff and self-attendance at courses and seminars		
			63.10 Evaluates benefits resulting from sending employees to upgrading programs		
B5.	Project Management				
			64.	Ensures construction conforms to current codes and standards	
			64.01 Acquires the latest version of the Building Code		
			64.02 Attends code related training programs		
			64.03 Ensures all plans and specifications comply with codes		
			64.04 Ensures field staff are knowledgeable of codes and standards		
			65.	Keeps up-to-date with new products and building processes	
			65.01 Acquires information on products at shows		
			65.02 Subscribes to product and building magazines		
			65.03 Attends conference and meetings		
			65.04 Evaluates new products and discusses their application with suppliers and installers		
	66.	Demonstrates how building components work together as a system			

			75.01	Ensures contracts reflect terms for supply of goods and / or services to be supplied to site	
			75.02	Includes terms of payment for supply of materials and / or labour	
			75.03	Describes penalties for non-performance	
	76.	Plans and schedules the project	76.01	Describes the principles of project scheduling	
			76.02	Identifies the steps required to define and complete a job	
			76.03	Schedules project activities with project financing	
			76.04	Ensures materials can be obtained at the required time	
			76.05	Ensures work is scheduled to allow for inspections to be completed prior to the commencing of the next phase	
			76.06	Develops reporting mechanisms to determine project progress in accordance with plan	
	77.	Arranges contingency plans to deal with potential problems	77.01	Describes the resources available to solve problems that arise during construction	
			77.02	Maintains contingency time in the schedule for problem resolution	
	78.	Establishes and maintains an effective working relationship with the clients	78.01	Outlines clearly the business's policies and procedures	
			78.02	Explains to your customers the extent and limitations of your business's warranty program	
			78.03	Explains product features and responds to questions	
			78.04	Ensures clients are kept informed of the work in progress	
			78.05	Sets up regular job site meetings to ensure ongoing communication	
	79.	Addresses and resolves client problems and concerns	78.06	Trains staff and subcontractors if need arises	
			79.01	Maintains open lines of communication	
			79.02	Shows empathy for client concerns and responds quickly	
			79.03	Responds to clients concerns and complaints honestly and diplomatically	
			79.04	Corrects the problem immediately whenever possible	
	80.	Provides after-sales service	80.01	Confirms and documents the business's service policy	
			80.02	Thanks client at job completion	
			80.03	Provides customer with warranty certificate	
			80.04	Responds to problems graciously and promptly	
B6.	Project Supervision				
	81.	Checks plans for errors and omissions	81.01	Reviews plans and specifications for irregularities or incompleteness	
			81.02	Implements necessary corrections	
	82.	Explains plans and schedules to all site personnel and to the client	82.01	Informs all site personnel of the construction schedule	
			82.02	Describes the construction schedule to the client	
	83.	Arranges for and acquires all required materials and labour	83.01	Places orders with suppliers and subcontractors	
			83.02	Hires required field employees	
	84.	Performs site inspections to monitor job progress and compliance with plans and specifications			

	85.	Supervises activities on the site to make certain they are being performed to business standards	84.01	Arranges for mandatory inspections as required										
			84.02	Ensures regular staff inspections are conducted as required										
			84.03	Informs staff when inspections will be conducted										
			85.01	Practices good supervisory skills										
			85.02	Informs trades when slippage is occurring on a project schedule so that they can reschedule other work during the interim										
			85.03	Maintains effective communication links between all site personnel and trades										
			85.04	Demonstrates sensitivity to workers' morale and general concerns										
			85.05	Completes all paperwork associated with work on site										
			85.06	Completes all change orders for a contract										
			85.07	Ensures work site is kept neat, tidy and safe										
			85.08	Ensures work being performed by the subtrades is technically competent and recognizes when substandard work is being done										
			85.09	Ensures level of quality is in line with business policy at all stages of production										
	86.	Implements procedures for controlling site activity												
			86.01	Educates employees on business policy										
			86.02	Reinforces and re-evaluates policy continually										
			86.03	Makes decisions based on business policy										
			86.04	Provides rationale for policies										
			86.05	Uses purchase order systems										
			86.06	Maintains labour and subtrade reports (scheduling and financial)										
			86.07	Monitors progress and compares to original schedule										
			86.08	Tracks materials not being used										
	87.	Enforces safe working conditions												
			87.01	Complies with the requirements of Workplace Hazardous Material Information System (WHMIS)										
			87.02	Complies with the requirements of the Occupational Health and Safety Act										
	88.	Participates in project cost control												
			88.01	Implements cost control procedures										
			88.02	Ensures accurate records are maintained										
B7.	Client Relations													
			89.	Educates customers										
			89.01	Outlines clearly the business's policies and procedures										
			89.02	Explains to customers extent and limitations of business's warranty program										
			89.03	Includes clients in initial and ongoing inspections										
			89.04	Explains product features and responds to questions										
			89.05	Prepares clients for a temporary lifestyle change and inconveniences resulting from extensive renovation										
			89.06	Explains job flow procedures and reason for "dead days" (no worker on site)										
	90.	Addresses issue of client accountability												
			90.01	Confirms mutual responsibilities during the job										
			90.02	Initiates an after-sales service program for product / services										
C1.	Monitoring and Evaluation of Objectives													
			91.	Evaluates whether personal goals are being achieved										
			91.01	Identifies which personal goals are of the greatest importance										

			91.02	Gathers business performance information related to associated business goals			
		92.	91.03	Assesses whether a business objectives are being met			
			92.01	Gathers relevant information regarding stated business goals			
			92.02	Compares estimated performance with actual performance			
		93.	93.01	Assesses where income is being generated			
			93.02	Identifies specific services offered by business to customers			
			93.03	Compares income generation to services offered			
		94.	94.01	Determines if time spent by one's self is reasonable and useful			
			94.02	Considers alternative staffing arrangements			
			94.03	Assesses one's self in relation to business growth and advancement			
		C2. Monitoring and Evaluation of Marketing and Sales Plans					
		95.		Determines why prospects came to the business			
			95.01	Develops procedures for tracking prospects			
			95.02	Records responses in a prescribed standard format			
			95.03	Assesses survey results and matches findings to marketing initiatives			
		96.		Determines why prospects purchased or did not purchase the product			
			96.01	Conducts ongoing evaluation with prospects and customers regarding the purchase decision			
			96.02	Identifies problems with unpopular products			
		93.		Reviews market situations / realities			
			97.01	Prepares detailed project reports covering a one-to-two year period			
			97.02	Determines total sales in the marketplace with total projects sold by the business			
			97.03	Compares sales volume with historical records on a month-to-month basis and by category			
			97.04	Determines actual selling prices throughout the marketplace			
			97.05	Develops criteria to compare similar jobs			
			97.06	Reviews economic indicators on interest rates, job creation and market expansions / contractions			
		98.		Compares monthly sales volume with projected sales volume and determines reasons for variances			
			98.01	Gathers accurate monthly sales reports			
			98.02	Compares actual sales to estimated sales			
		99.		Determines sales coming from target market			
			99.01	Prepares customer profiles for each product sold			
			99.02	Establishes ratio of estimates to sales			
			99.03	Develops a category analysis (breakdown by job category)			
			99.04	Confirms the profile of the planned target market			
		100.		Determines sales resulting from client referral plan			
			100.01	Determines how customers came to your business			
			100.02	Identifies customers referred to business by other customers			

			109.02	Assesses the number of complaints directed at the quality of work performed			
			109.03	Analyzes complaints to identify causes of most common complaints Determines if response and solution to problems are acceptable			
		110. Develops options for improving business performance	109.04				
			110.01	Assesses the business's performance in relation to goals and objectives			
			110.02	Determines those areas which are in need of improvement			
			110.03	Consults with staff to explore options to improve business performance Lists the options which are available for improving business performance			
		111. Assesses options and modifies plans	111.01	Assesses existing business plan in relation to its suitability for the next business cycle			
			111.02	Assesses options for modifying plans			
			111.03	Revises or modifies existing business plan or prepares new business plan			
		112. Revises procedures	112.01	Implements new procedures consistent with the revised plan			
			112.02	Communicates new systems and procedures with employees and subcontractors			
			112.03	Monitors implementation of the new procedures			
C5. Monitoring and Evaluation of Human Resources							
		113. Assesses performance of employees	113.01	Evaluates productivity of employees in performing their job			
			113.02	Evaluates how employees work with their peers			
			113.03	Evaluates employees' performance in relation to the client and trades			
			113.04	Conducts performance review meeting with the employees			
		114. Compares staff salaries with industry / market standards					
			114.01	Determines industry standards for salaries for various job categories			
			114.02	Determines the comparable salary to pay when including benefits package			
			114.03	Compares the value of the work performed by the employees in relation to industry standards			
		115. Determines effectiveness of training initiatives					
			115.01	Identifies training activities conducted			
			115.02	Describes expected results from training			
			115.03	Determines employees perspective on training initiatives			
			115.04	Identifies additional training requirements			

SUB-BLOCK	TASK	SUBTASK	Awareness	Knowledge	Skill
A1. Definition of Business Goals					
	1. Establish personal goals				
		1.01 Clarifies the reasons for starting or continuing business			
		1.02 Defines what is to be accomplished			
		1.03 Defines and records achievable and measurable goals for the short and long term			
		1.04 Determines the opportunity costs of investing your money elsewhere			
		1.05 Determines if you are prepared to make the necessary personal sacrifice			
	2. Establishes business goals				
		2.01 Assesses the changing trends and approaches affecting the residential industry			
		2.02 Establishes short - and long - term objectives			
		2.03 Applies personal goals to business goals			
		2.04 Determines financial goals			
		2.05 Determines the desired business image			
		2.06 Develops a business mission statement			
	3. Determines scope of services				
		3.01 Determines type of services being offered in the marketplace			
		3.02 Determines which services are required for the business to reach its objectives			
	4. Determines business approach				
		4.01 Determines the expected size of the business			
		4.02 Determines the form / structure of the business			
		4.03 Determines elements of business operations to be performed in-house and those which will be subcontracted			
		4.04 Determines what tasks to do personally			
A2. Development of Marketing and Sales Plans					
	5. Determines the general market environment				
		5.01 Assesses the market conditions			
		5.02 Identifies market opportunities			
	6. Determines the target market				
		6.01 Determines the needs and wants of the market			
		6.02 Defines which group of purchasers would be interested in the product			
		6.03 Clearly defines which purchaser groups you want to have an interest in your product			
		6.04 Defines the type of people in the industry one wants to work with			
	7. Determines where the business should be positioned				
		7.01 Determines the manner in which the business provides greater value than that of competitors			
		7.02 Decides how target group prospects should perceive your business / product and compare it to others			
		7.03 Gathers feedback from the target group concerning the business position			
	8. Develops a pricing strategy				
		8.01 Determines projected cost of products including mark-up			
		8.02 Determines market prices for comparable products			
		8.03 Establishes asking price for products, based on business positioning, marketing strategy and margin requirements			

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9.	Develops an original strategy for the marketing activities	9.01	Decides on the message that you want to convey to the target audience			
		9.02	Identifies techniques to effectively communicate the message to the target market			
		9.03	Creates a unique marketing image that makes your product and business stand out from all others			
10.	Develops a sales strategy for the business					
		10.01	Develops the basic tasks associated with selling			
		10.02	Identifies the advantages and disadvantages between selling yourself, using your staff and using an agent			
		10.03	Determines at what point of the year you will sell your products			
		10.04	Determines the effect upon sales of site presentation and business			
11.	Develops a public relations plan					
		11.01	Demonstrates the importance of public relations			
		11.02	Determines public relations options best suited to your marketing strategy and business positioning			
		11.03	Prepares a public relations plan			
		11.04	Develops a budget for public relations activities			
12.	Determines the marketing tools to be used					
		12.01	Decides on the kind of methods one will use to reach the target groups with the message about the product and business			
		12.02	Determines the amount of money to be allocated to marketing			
		12.03	Determines when each method will be employed and over what time period			
		12.04	Determines the optimum marketing tool for the product / business using cost effectiveness data			
13.	Develops an advertising plan					
		13.01	Assesses objectives			
		13.02	Allocates budget			
		13.03	Develops a monthly advertising plan			
		13.04	Evaluates and selects medium			
		13.05	Develops advertising materials consistent with marketing strategy			
		13.06	Develops copy - for letterhead, business cards, advertising, signage and other promotional vehicles - consistent with the corporate image			
		13.07	Selects the market areas and media for placement of advertising			
		13.08	Establishes a purchasing plan			
		13.09	Obtains co-operation and financial support from suppliers			
		13.10	Develops a procedure for tracking results			
14.	Develops a client referral plan					
		14.01	Determines how previous clients can assist in marketing the business			
		14.02	Identifies alternative means of communicating client satisfaction in the business's product and / or service to the target market			
		14.03	Communicates the client referral plan to the staff, subcontractors and prospective clients			
A3.	Development of a Financial Plan					
15.	Prepares pro forma income statements					
		15.01	Projects expected gross revenue from sales of the products and services			
		15.02	Determines the cost of producing the product or providing the service			
		15.03	Estimates the cost of operating the business			

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			26.02	Develops customer service policies			
			26.03	Establishes a level of customer service			
	27.	Develops a waste management plan	27.01	Reviews waste stream being generated from construction activities			
			27.02	Determines where wastes can be reduced within the project			
			27.03	Determines which materials can be sent to recycling centres			
A5.		Development of a Human Resource Plan					
	28.	Determines the human resource needs	28.01	Arranges groups of tasks into job functions			
			28.02	Determines whether work is to be performed by in-house staff or by trade or professional subcontractors			
			28.03	Determines desired staffing complement			
			28.04	Identifies skills required of the key personnel			
			28.05	Plans the long-term approach to skills upgrading			
			28.06	Determines priorities to be used when establishing relationships with company employees, such as: profitability, quality control, business approach and ethics			
	29.	Prepares job descriptions for all employees	29.01	Assigns job functions to employees			
			29.02	Determines responsibilities and authority for each job			
	30.	Prepares plans to ensure the business has sufficient skilled human resources	30.01	Determines which skills should ideally be provided by employees of the business			
			30.02	Determines the training required to provide the needed skills and knowledge to the owner			
			30.03	Assesses the skills and knowledge that are available through the use of contract labour			
			30.04	Determines how human resources will be acquired			
B1.		Business Management					
	31.	Organizes and equips the business office	31.01	Develops an organizational chart			
			31.02	Develops internal office systems			
			31.03	Determines equipment and supplies required			
			31.04	Capitalizes on office equipment and product features to enhance efficiency			
			31.05	Recognizes the type of work for which a computer is most suited in the industry			
			31.06	Decides whether the operation would benefit from the use of a computer			
			31.07	Determines how a computer would be introduced into the business operation			
	32.	Develops clear instructions relating to job functions and tasks being delegated	32.01	Defines the task clearly - both what is to be done and why			
			32.02	Determines whether the individual can adequately perform the task			
			32.03	Defines clearly the level and limits of authority delegated			
			32.04	Provides assistance, as required to ensure that the task will be satisfactorily completed			
			32.05	Ensures that problems are clearly communicated			
	33.	Assesses value of information required to manage business	33.01	Decides when, and what, information is required in order to manage the operations of the business			
			33.02	Collects the necessary information			

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			41.02	Assesses the extent to which the individuals functioning within the business reflect the desired image			
			41.03	Assesses the extent of the actual business image to ensure it reflects the desired image			
			41.04	Employs business practices that reflect personal and client sensitiveness			
			41.05	Obtains and assesses feedback concerning the image of the business			
	42.	Manages the advertising plan					
			42.01	Oversees development and production of advertising materials to ensure consistency of message			
			42.02	Places advertising in selected media as applicable			
			42.03	Evaluates placement costs in relation to marketing budget			
			42.04	Assesses effectiveness of each media in relation to good leads per dollar spent by tracking the prospects			
			42.05	Removes less effective advertising placements			
	43.	Manages the public relations plan					
			43.01	Arranges for public relations activities for the business			
			43.02	Provides information to media on business products and activities			
	44.	Manages the sales program					
			44.01	Selects and recruits sales personnel to put sales program into effect			
			44.02	Develops sales presentation consistent with market plan			
			44.03	Arranges for training of sales people representing the business			
			44.04	Schedules sales activities			
			44.05	Obtains feedback from sales people relating to market acceptance			
			44.06	Develops and establishes closure procedures and an administrative framework for closing a sale			
			44.07	Ensures that sales staff is informed of production problems			
	45.	Manages the client referral plan					
			45.01	Ensures that the job is done right the first time			
			45.02	Requests acknowledgement of client satisfaction (letter of recommendation)			
			45.03	Sends or provides token of appreciation to customers			
			45.04	Revisits existing clients			
			45.05	Obtains permission to use certain projects for demonstration purposes			
			45.06	Lives up to the business's service policy			
	46.	Qualifies the prospect					
			46.01	Determines if the type of work proposed suits and is of interest to the business			
			46.02	Determines the seriousness and commitment of the customer			
			46.03	Assesses the competition for the project			
			46.04	Evaluates the time frame of the proposed work and ensures that the schedule can accommodate it			
			46.05	Determines the customer's ability to pay			
	47.	Assesses prospect expectations and needs					
			47.01	Develops a questionnaire in advance of sales calls designed to elicit information about client needs and expectations			
			47.02	Arranges the time and place for a meeting			
			47.03	Develops a method to obtain answers to questionnaire			
			47.04	Listens to and records customer input			
	48.	Develops sales and / or exit strategies					
			48.01	Assesses client			
			48.02	Prepares sales presentation			
			48.03	Uses effective closing techniques			
	49.	Obtains client commitment / contract					

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			49.01	Presents a proposal of work to be performed			
			49.02	Discusses details of the proposal with customer			
			49.03	Overcomes objectives that customers might have			
			49.04	Closes the deal and puts in place the mechanism to obtain signed contract			
			49.05	Accepts deposit			
B3. Financial Management							
	50. Establishes and maintains an accounting system that can be easily related to industry projects						
			50.01	Chooses an accountant who is familiar with the industry			
			50.02	Establishes accounting procedures which provide information for each project			
			50.03	Establishes accounting procedures which distinguish between fixed and variable overhead costs			
			50.04	Establishes accounting procedures which allow for regular and ongoing review			
			50.05	Explains the basic accounting principles associated with accounts receivable and payable			
			50.06	Maintains the appropriate documentation for accounts receivable and payable			
			50.07	Maintains a system that compares accounts receivable to accounts payable and cash flow			
			50.08	Establishes and maintains collection procedures for accounts receivable			
			50.09	Develops a system to ensure that accounts are paid within the terms outlined in credit agreements			
	51. Interprets financial statements and reports						
			51.01	Identifies the source of financial statements within the business			
			51.02	Interprets the contents of the balance sheet			
			51.03	Explains the different components of a balance sheet			
			51.04	Explains the concepts of assets and liabilities			
			51.05	Interprets profit and loss statements			
			51.06	Reads and interprets earned surplus or retained earnings statement			
			51.07	Explains some of the basic ratios associated with interpreting financial statement, such as working capital ratio and interest coverage ratio			
	52. Establishes required financing						
			52.01	Identifies the services and lending limits of banks, mortgage companies, mortgage brokers, credit unions and trust companies			
			52.02	Establishes an effective working relationship with account managers by keeping them informed of progress on specific projects and business in general			
	53. Negotiates payment terms with suppliers, subcontractors and developers						
			53.01	Determines normal credit arrangements			
			53.02	Negotiates new credit arrangements			
	54. Sets up and uses a system to control costs at all levels of the business operations						
			54.01	Implements a system for material purchases			
			54.02	Develops a system for field verification of materials and labour bills			
			54.03	Establishes and works within an approved budget			
	55. Sets up system to control cash flow						

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			55.01	Explains the purpose of a cash flow system			
			55.02	Predicts job costs and identifies points in time where cash resources will be required			
			55.03	Monitors and updates cash flow projections on a regular basis			
			55.04	Establishes lines of credit with different financial institutions			
	56.	Establishes and maintains a system for project cost control					
			56.01	Explains the concept of project cost control			
			56.02	Maintains accurate project costing records, including labour, materials, subcontractors, etc.			
			56.03	Compares actual project costs to budget figures			
			56.04	Makes necessary adjustments to future job estimates as required			
			56.05	Implements a purchase order system or puts in place alternatives to verify that supplier and subcontractor invoices correspond to goods and services			
			56.06	Maintains control over expenditures and productivity on the job site			
	57.	Establishes effective purchasing practices					
			57.01	Develops a needs list by category and alternatives			
			57.02	Investigates all sources of supply			
			57.03	Requests quotations and terms			
			57.04	Compares quotes			
			57.05	Reviews previous pricing			
			57.06	Makes buying decision			
			57.07	Documents purchases (issues P.O.'s)			
B4.	Human Resource Management						
	58.	Determines salary, benefits and incentive packages					
			58.01	Determines base salary rates for each job function - commensurates with duties and responsibilities performed			
			58.02	Determines benefits package to be provided			
			58.03	Holds regular reviews and performance ratings and adjusts salary accordingly			
			58.04	Offers additional bonus and incentive package such as a profit sharing plan			
	59.	Adopts effective recruiting practices					
			59.01	Evaluates the skill level required for a given job			
			59.02	Fills vacant positions			
			59.03	Explains the salary and compensation package to employees			
			59.04	Describes the remittance requirements			
			59.05	Abides by legislation governing employees in the workplace			
			59.06	Abides by the terms of collective agreements as applicable			
	60.	Recognizes the strengths and limitations of employees and assigns them work accordingly					
			60.01	Assesses employee skills and knowledge			
			60.02	Assigns work that challenges employees to do their best			
	61.	Provides clear instructions when assigning tasks					
			61.01	Defines the tasks to be performed clearly			
			61.02	Sets up a time schedule			
			61.03	Delegates a task			
	62.	Prepares evaluation criteria for employee performance					
			62.01	Develops rating system for scoring			
			62.02	Sets time periods for evaluations			
			62.03	Explains requirements to employees			

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	63.	Provides skills development and educational upgrading for all employees	62.04	Ties remuneration increase to a promotion as a reward			
			63.01	Identifies career path opportunities for employees			
			63.02	Provides training for new employees or employees being phased into new jobs, ensuring that their performance meet the requirements			
			63.03	Identifies the role of training in phasing employees into positions of increasing responsibility			
			63.04	Determines skills upgrading requirements			
			63.05	Provides skills development and educational upgrading as a means of improving productivity and profitability			
			63.06	Establishes and maintains a skills development schedule			
			63.07	Allows employees to understand the operation and functions of the various parts of the business			
			63.08	Identifies appropriate skills development vehicles and knowledge upgrading programs			
			63.09	Encourages and makes arrangements for staff and self-attendance at courses and seminars			
			63.10	Evaluates benefits resulting from sending employees to upgrading programs			
B5. Project Management							
	64.	Ensures construction conforms to current codes and standards					
			64.01	Acquires the latest version of the Building Code			
			64.02	Attends code related training programs			
			64.03	Ensures all plans and specifications comply with codes			
			64.04	Ensures field staff are knowledgeable of codes and standards			
	65.	Keeps up-to-date with new products and building processes					
			65.01	Acquires information on products at shows			
			65.02	Subscribes to product and building magazines			
			65.03	Attends conference and meetings			
			65.04	Evaluates new products and discusses their application with suppliers and installers			
	66.	Demonstrates how building components work together as a system					
			66.01	Inspects building thoroughly			
			66.02	Identifies the different components of a building			
			66.03	Assesses the impact of renovation activity on the system			
	67.	Develops solutions to problems which result from building activities					
			67.01	Defines and exposes the problem			
			67.02	Develops and decides on the best possible solution			
			67.03	Maintains a rational perspective			
	68.	Performs thorough site investigation, checks on zoning and ensures all required permits are in place					
			68.01	Investigates site for irregularities			
			68.02	Ensures all construction related permits are in place			
	69.	Perform thorough house inspections					
			69.01	Inspects existing house systems			
			69.02	Investigates the parts of the house that will be affected by the proposed renovation			
	70.	Prepares designs, plans and specifications					
			70.01	Represents the design in plans and specifications			

71.	Estimates accurately all costs of the project	70.02	Reviews plans and specifications with the customer for approval prior to construction				
		71.01	Employs a standard format for estimating project costs, ensuring that the format is detailed				
		71.02	Checks estimate to ensure that all hard and soft costs have been accounted for				
		71.03	Updates base costs on an ongoing basis				
		71.04	Provides cash allowances if and when specifications have not been adequately detailed or chosen by the home owner				
		71.05	Allows for a contingency as a means of protecting profit margin				
72.	Prepares clear documentation for the bidding and tendering process						
		72.01	Prepares bid packages				
		72.02	Provides bid instructions for subcontractors and suppliers				
		72.03	Prepares clear and accurate documents for tenders				
73.	Complies with contractual requirements						
		73.01	Identifies the major legal requirements of a contract				
		73.02	Identifies the difference between a verbal, a written contract and an interim contract				
		73.03	Ensures that all pages of a contract, plans and specifications are signed and initialed				
		73.04	Identifies addenda to contracts				
		73.05	Identifies those circumstances when it would be appropriate to use a lawyer				
		73.06	Utilizes the appropriate contract for a variety of conditions				
		73.07	Complies with standard clauses of a sales contract				
74.	Prepares clear documentation to ensure an effective bidding and tendering process for subcontractors and suppliers						
		74.01	Prepares tender packages				
		74.02	Provides bid instructions for subcontractors and suppliers				
75.	Prepares contracts to hire subcontractors and suppliers						
		75.01	Ensures contracts reflect terms for supply of goods and / or services to be supplied to site				
		75.02	Includes terms of payment for supply of materials and / or labour				
		75.03	Describes penalties for non-performance				
76.	Plans and schedules the project						
		76.01	Describes the principles of project scheduling				
		76.02	Identifies the steps required to define and complete a job				
		76.03	Schedules project activities with project financing				
		76.04	Ensures materials can be obtained at the required time				
		76.05	Ensures work is scheduled to allow for inspections to be completed prior to the commencing of the next phase				
		76.06	Develops reporting mechanisms to determine project progress in accordance with plan				
77.	Arranges contingency plans to deal with potential problems						
		77.01	Describes the resources available to solve problems that arise during construction				
		77.02	Maintains contingency time in the schedule for problem resolution				
78.	Establishes and maintains an effective working relationship with the clients						
		78.01	Outlines clearly the business's policies and procedures				

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			78.02	Explains to your customers the extent and limitations of your business's warranty program			
			78.03	Explains product features and responds to questions			
			78.04	Ensures clients are kept informed of the work in progress			
			78.05	Sets up regular job site meetings to ensure ongoing communication			
			78.06	Trains staff and subcontractors if need arises			
		79.		Addresses and resolves client problems an concerns			
			79.01	Maintains open lines of communication			
			79.02	Shows empathy for client concerns and responds quickly			
			79.03	Responds to clients concerns and complains honestly and diplomatically			
			79.04	Corrects the problem immediately whenever possible			
		80.		Provides after-sales service			
			80.01	Confirms and documents the business's service policy			
			80.02	Thanks client at job completion			
			80.03	Provides customer with warranty certificate			
			80.04	Responds to problems graciously and promptly			
B6.	Project Supervision						
		81.		Checks plans for errors and omissions			
			81.01	Reviews plans and specifications for irregularities or incompleteness			
			81.02	Implements necessary corrections			
		82.		Explains plans and schedules to all site personnel and to the client			
			82.01	Informs all site personnel of the construction schedule			
			82.02	Describes the construction schedule to the client			
		83.		Arranges for and acquires all required materials and labour			
			83.01	Places orders with suppliers and subtrades			
			83.02	Hires required field employees			
		84.		Performs site inspections to monitor job progress and compliance with plans and specifications			
			84.01	Arranges for mandatory inspections as required			
			84.02	Ensures regular staff inspections are conducted as required			
			84.03	Informs staff when inspections will be conducted			
		85.		Supervises activities on the site to make certain they are being performed to business standards			
			85.01	Practices good supervisory skills			
			85.02	Informs trades when slippage is occurring on a project schedule so that they can reschedule other work during the interim			
			85.03	Maintains effective communication links between all site personnel and trades			
			85.04	Demonstrates sensitivity to workers' morale and general concerns			
			85.05	Completes all paperwork associated with work on site			
			85.06	Completes all change orders for a contract			
			85.07	Ensures work site is kept neat, tidy and safe			
			85.08	Ensures work being performed by the subtrades is technically competent and recognizes when substandard work is being done			
			85.09	Ensures level of quality is in line with business policy at all stages of production			
		86.		Implements procedures for controlling site activity			
			86.01	Educates employees on business policy			
			86.02	Reinforces and re-evaluates policy continually			

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			86.03	Makes decisions based on business policy			
			86.04	Provides rationale for policies			
			86.05	Uses purchase order systems			
			86.06	Maintains labour and subtrade reports (scheduling and financial)			
			86.07	Monitors progress and compares to original schedule			
			86.08	Tracks materials not being used			
	87. Enforces safe working conditions		87.01	Complies with the requirements of Workplace Hazardous Material Information System (WHMIS)			
			87.02	Complies with the requirements of the Occupational Health and Safety Act			
	88. Participates in project cost control		88.01	Implements cost control procedures			
			88.02	Ensures accurate records are maintained			
B7. Client Relations							
	89. Educates customers		89.01	Outlines clearly the business's policies and procedures			
			89.02	Explains to customers extent and limitations of business's warranty program			
			89.03	Includes clients in initial and ongoing inspections			
			89.04	Explains product features and responds to questions			
			89.05	Prepares clients for a temporary lifestyle change and inconveniences resulting from extensive renovation			
			89.06	Explains job flow procedures and reason for "dead days" (no worker on site)			
	90. Addresses issue of client accountability		90.01	Confirms mutual responsibilities during the job			
			90.02	Initiates an after-sales service program for product / services			
C1. Monitoring and Evaluation of Objectives							
	91. Evaluates whether personal goals are being achieved		91.01	Identifies which personal goals are of the greatest importance			
			91.02	Gathers business performance information related to associated business goals			
			91.03	Assesses degree to which goals are being met			
	92. Assesses whether a business objectives are being met		92.01	Gathers relevant information regarding stated business goals			
			92.02	Compares estimated performance with actual performance			
	93. Determines if services being offered are appropriate		93.01	Assesses where income is being generated			
			93.02	Identifies specific services offered by business to customers			
			93.03	Compares income generation to services offered			
	94. Assesses the approach to business		94.01	Determines if time spent by one's self is reasonable and useful			
			94.02	Considers alternative staffing arrangements			
			94.03	Assesses one's self in relation to business growth and advancement			
C2. Monitoring and Evaluation of Marketing and Sales Plans							
	95. Determines why prospects came to the business		95.01	Develops procedures for tracking prospects			
			95.02	Records responses in a prescribed standard format			
			95.03	Assesses survey results and matches findings to marketing initiatives			

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	96. Determines why prospects purchased or did not purchase the product	96.01	Conducts ongoing evaluation with prospects and customers regarding the purchase decision			
		96.02	Identifies problems with unpopular products			
	93. Reviews market situations / realities	97.01	Prepares detailed project reports covering a one-to-two year period			
		97.02	Determines total sales in the marketplace with total projects sold by the business			
		97.03	Compares sales volume with historical records on a month-to-month basis and by category			
		97.04	Determines actual selling prices throughout the marketplace			
		97.05	Develops criteria to compare similar jobs			
		97.06	Reviews economic indicators on interest rates, job creation and market expansions / contractions			
	98. Compares monthly sales volume with projected sales volume and determines reasons for variances	98.01	Gathers accurate monthly sales reports			
		98.02	Compares actual sales to estimated sales			
	99. Determines sales coming from target market	99.01	Prepares customer profiles for each product sold			
		99.02	Establishes ratio of estimates to sales			
		99.03	Develops a category analysis (breakdown by job category)			
		99.04	Confirms the profile of the planned target market			
	100. Determines sales resulting from client referral plan	100.01	Determines how customers came to your business			
		100.02	Identifies customers referred to business by other customers			
	101. Determines whether business is positioned as planned	101.01	Collects information from prospects and customers on their perception of the business			
		101.02	Gathers information from trades, staff and professionals regarding their perception of the business			
C3. Monitoring and Evaluation of the Financial Plan						
	102. Reviews financial reports	102.01	Reviews and assesses monthly statements			
		102.02	Ensures that the financial reports are accurate and reflect the true situation (i.e., accrual basis)			
		102.03	Evaluates business performance			
	103. Compares financial reports against budget expectations	103.01	Gets current (actual), timely data			
		103.02	Compares the actual financial report to the original budget for variances			
		103.03	Analyzes variances			
		103.04	Develops and executes an action plan			
	104. Prepares final report on each project	104.01	Sets up a system to track job costs			
		104.02	Documents the cost estimate for a project and compares it to the actual cost upon completion			
		104.03	Calculates business's profit or loss on a project as a percentage			
		104.04	Determines ways to reduce variances in future projects			
	105. Compares actual margins with expected margins					

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			105.01	Monitors job cost control system on a continual basis		
			105.02	Reviews monthly financial statements		
			105.03	Reviews cost reports on each project		
	106.	Evaluates requirements for cash flow and capital				
			106.01	Monitors payables versus receivables		
			106.02	Establishes cash flow requirements		
			106.03	Satisfies cash flow requirements		
			106.04	Compares actual capital requirements to original estimate		
C4.	Monitoring and Evaluation of the Operating Plan					
	107.	Monitors operating performance indicators				
			107.01	Collects information on employee performance and production efficiencies		
			107.02	Collects information on sales and financial indicators		
	108.	Monitors type and frequency of customer complaints				
			108.01	Develops a centralized record system for logging complaints by job and by stage of work		
			108.02	Develops a system for reporting complaints received, action taken and results achieved on a regular basis		
			108.03	Assesses ability of the business to respond to customer complaints		
	109.	Monitors the effectiveness of problem solving				
			109.01	Assesses number of problems identified in the business from all areas		
			109.02	Assesses the number of complaints directed at the quality of work performed		
			109.03	Analyzes complaints to identify causes of most common complaints		
			109.04	Determines if response and solution to problems are acceptable		
	110.	Develops options for improving business performance				
			110.01	Assesses the business's performance in relation to goals and objectives		
			110.02	Determines those areas which are in need of improvement		
			110.03	Consults with staff to explore options to improve business performance		
			110.04	Lists the options which are available for improving business performance		
	111.	Assesses options and modifies plans				
			111.01	Assesses existing business plan in relation to its suitability for the next business cycle		
			111.02	Assesses options for modifying plans		
			111.03	Revises or modifies existing business plan or prepares new business plan		
	112.	Revises procedures				
			112.01	Implements new procedures consistent with the revised plan		
			112.02	Communicates new systems and procedures with employees and subcontractors		
			112.03	Monitors implementation of the new procedures		
C5.	Monitoring and Evaluation of Human Resources					
			113.	Assesses performance of employees		
			113.01	Evaluates productivity of employees in performing their job		
			113.02	Evaluates how employees work with their peers		

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			113.03	Evaluates employees' performance in relation to the client and trades Conducts performance review meeting with the employees			
			113.04				
	114. Compares staff salaries with industry / market standards		114.01	Determines industry standards for salaries for various job categories Determines the comparable salary to pay when including benefits package Compares the value of the work performed by the employees in relation to industry standards			
			114.02				
			114.03				
	115. Determines effectiveness of training initiatives		115.01	Identifies training activities conducted			
			115.02	Describes expected results from training			
			115.03	Determines employees perspective on training initiatives			
			115.04	Identifies additional training requirements			

SUB-BLOCK	TASK	SUBTASK	Awareness	Knowledge	Skill
A1.	Definition of Business Goals				
	1. Establish personal goals				
		1.01 Clarifies the reasons for starting or continuing business			
		1.02 Defines what is to be accomplished			
		1.03 Defines and records achievable and measurable goals for the short and long term			
		1.04 Determines the opportunity costs of investing your money elsewhere			
		1.05 Determines if you are prepared to make the necessary personal sacrifice			
	2. Establishes business goals				
		2.01 Assesses the changing trends and approaches affecting the residential industry			
		2.02 Establishes short - and long - term objectives			
		2.03 Applies personal goals to business goals			
		2.04 Determines financial goals			
		2.05 Determines the desired business image			
		2.06 Develops a business mission statement			
	3. Determines scope of services				
		3.01 Determines type of services being offered in the marketplace			
		3.02 Determines which services are required for the business to reach its objectives			
	4. Determines business approach				
		4.01 Determines the expected size of the business			
		4.02 Determines the form / structure of the business			
		4.03 Determines elements of business operations to be performed in-house and those which will be subcontracted			
		4.04 Determines what tasks to do personally			
A2.	Development of Marketing and Sales Plans				
	5. Determines the general market environment				
		5.01 Assesses the market conditions			
		5.02 Identifies market opportunities			
	6. Determines the target market				
		6.01 Determines the needs and wants of the market			
		6.02 Defines which group of purchasers would be interested in the product			
		6.03 Clearly defines which purchaser groups you want to have an interest in your product			
		6.04 Defines the type of people in the industry one wants to work with			
	7. Determines where the business should be positioned				
		7.01 Determines the manner in which the business provides greater value than that of competitors			
		7.02 Decides how target group prospects should perceive your business / product and compare it to others			
		7.03 Gathers feedback from the target group concerning the business position			
	8. Develops a pricing strategy				
		8.01 Determines projected cost of products including mark-up			
		8.02 Determines market prices for comparable products			
		8.03 Establishes asking price for products, based on business positioning, marketing strategy and margin requirements			

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9.	Develops an original strategy for the marketing activities	9.01	Decides on the message that you want to convey to the target audience			
		9.02	Identifies techniques to effectively communicate the message to the target market			
		9.03	Creates a unique marketing image that makes your product and business stand out from all others			
10.	Develops a sales strategy for the business	10.01	Develops the basic tasks associated with selling			
		10.02	Identifies the advantages and disadvantages between selling yourself, using your staff and using an agent			
		10.03	Determines at what point of the year you will sell your products			
		10.04	Determines the effect upon sales of site presentation and business			
11.	Develops a public relations plan	11.01	Demonstrates the importance of public relations			
		11.02	Determines public relations options best suited to your marketing strategy and business positioning			
		11.03	Prepares a public relations plan			
		11.04	Develops a budget for public relations activities			
12.	Determines the marketing tools to be used	12.01	Decides on the kind of methods one will use to reach the target groups with the message about the product and business			
		12.02	Determines the amount of money to be allocated to marketing			
		12.03	Determines when each method will be employed and over what time period			
		12.04	Determines the optimum marketing tool for the product / business using cost effectiveness data			
13.	Develops an advertising plan	13.01	Assesses objectives			
		13.02	Allocates budget			
		13.03	Develops a monthly advertising plan			
		13.04	Evaluates and selects medium			
		13.05	Develops advertising materials consistent with marketing strategy			
		13.06	Develops copy - for letterhead, business cards, advertising, signage and other promotional vehicles - consistent with the corporate image			
		13.07	Selects the market areas and media for placement of advertising			
		13.08	Establishes a purchasing plan			
		13.09	Obtains co-operation and financial support from suppliers			
		13.10	Develops a procedure for tracking results			
14.	Develops a client referral plan	14.01	Determines how previous clients can assist in marketing the business			
		14.02	Identifies alternative means of communicating client satisfaction in the business's product and / or service to the target market			
		14.03	Communicates the client referral plan to the staff, subcontractors and prospective clients			
A3.	Development of a Financial Plan					
15.	Prepares pro forma income statements	15.01	Projects expected gross revenue from sales of the products and services			
		15.02	Determines the cost of producing the product or providing the service			
		15.03	Estimates the cost of operating the business			

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			26.02	Develops customer service policies			
			26.03	Establishes a level of customer service			
	27.	Develops a waste management plan					
			27.01	Reviews waste stream being generated from construction activities			
			27.02	Determines where wastes can be reduced within the project			
			27.03	Determines which materials can be sent to recycling centres			
A5.		Development of a Human Resource Plan					
	28.	Determines the human resource needs					
			28.01	Arranges groups of tasks into job functions			
			28.02	Determines whether work is to be performed by in-house staff or by trade or professional subcontractors			
			28.03	Determines desired staffing complement			
			28.04	Identifies skills required of the key personnel			
			28.05	Plans the long-term approach to skills upgrading			
			28.06	Determines priorities to be used when establishing relationships with company employees, such as: profitability, quality control, business approach and ethics			
	29.	Prepares job descriptions for all employees					
			29.01	Assigns job functions to employees			
			29.02	Determines responsibilities and authority for each job			
	30.	Prepares plans to ensure the business has sufficient skilled human resources					
			30.01	Determines which skills should ideally be provided by employees of the business			
			30.02	Determines the training required to provide the needed skills and knowledge to the owner			
			30.03	Assesses the skills and knowledge that are available through the use of contract labour			
			30.04	Determines how human resources will be acquired			
B1.		Business Management					
	31.	Organizes and equips the business office					
			31.01	Develops an organizational chart			
			31.02	Develops internal office systems			
			31.03	Determines equipment and supplies required			
			31.04	Capitalizes on office equipment and product features to enhance efficiency			
			31.05	Recognizes the type of work for which a computer is most suited in the industry			
			31.06	Decides whether the operation would benefit from the use of a computer			
			31.07	Determines how a computer would be introduced into the business operation			
	32.	Develops clear instructions relating to job functions and tasks being delegated					
			32.01	Defines the task clearly - both what is to be done and why			
			32.02	Determines whether the individual can adequately perform the task			
			32.03	Defines clearly the level and limits of authority delegated			
			32.04	Provides assistance, as required to ensure that the task will be satisfactorily completed			
			32.05	Ensures that problems are clearly communicated			
	33.	Assesses value of information required to manage business					
			33.01	Decides when, and what, information is required in order to manage the operations of the business			
			33.02	Collects the necessary information			

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34.	Uses effective communication skills	33.03	Organizes the data in a format suitable for analysis	
		34.01	Speaks clearly and concisely	
		34.02	Uses language and terminology appropriate for the audience	
		34.03	Develops attitudes that facilitate verbal communications	
		34.04	Identifies the reasons for communication breakdowns	
		34.05	Provides appropriate feedback	
		34.06	Identifies those instances when written communication is most appropriate	
		34.07	Determines when verbal communications must be put in writing	
		34.08	Writes in a clear, correct and organized manner	
		34.09	Evaluates client concerns and provides appropriate response	
35.	Solicits employee input on business operations			
		35.01	Be accessible to staff	
		35.02	Conducts regular staff meetings	
		35.03	Outlines methods for employees to provide feedback	
36.	Demonstrates leadership			
		36.01	Implements the process of team building	
		36.02	Describes the relationship between the leader and the people	
		36.03	Explains the different levels of positive and negative motivation	
		36.04	Practices effective motivational skills	
		36.05	Emphasizes the personal benefits resulting from achieving expectations	
		36.06	Instills the desire to achieve	
37.	Outlines and communicates goal achievement measures			
		37.01	States short - and long - term goals and objectives clearly	
		37.02	Ensures that the staff are aware of the stated goals and objectives	
		37.03	Determines staff responsibilities in relation to attaining the goals	
		37.04	Outlines the process to be used in reviewing business progress in relation to the established goals and objectives	
		37.05	Identifies critical milestones for attaining goals	
		37.06	Indicates the timing for attaining goals and objectives	
38.	Ensures that staff is updated and informed about the operations of the business			
		38.01	Keeps staff informed about the operations of the business	
		38.02	Provides opportunities for staff to ask questions	
39.	Obtains appropriate business insurance, licences and permits			
		39.01	Obtains liability insurance	
		39.02	Obtains construction insurance	
		39.03	Registers with Workers' Compensation Board (WCB)	
40.	Protects the interests of the business			
		40.01	Ensures that the contract has been understood and agreed to by both parties	
		40.02	States all specifications and steps to be taken clearly	
		40.03	Determines the value of an arbitration clause in the contract	
		40.04	Maintains open lines of communications throughout the project	
		40.05	Documents activities with different projects	
		40.06	Details the steps in seeking a solution to client / contractor problem	
		40.07	Negotiates a fair and mutual settlement	
		40.08	Collects money on time	
B2. Marketing and Sales				
41.	Manages the marketing strategy			
		41.01	States to employees and subcontractors the corporate strategy and ensures they work to the stated level of performance	

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			41.02	Assesses the extent to which the individuals functioning within the business reflect the desired image			
			41.03	Assesses the extent of the actual business image to ensure it reflects the desired image			
			41.04	Employs business practices that reflect personal and client sensitiveness			
			41.05	Obtains and assesses feedback concerning the image of the business			
	42.	Manages the advertising plan	42.01	Oversees development and production of advertising materials to ensure consistency of message			
			42.02	Places advertising in selected media as applicable			
			42.03	Evaluates placement costs in relation to marketing budget			
			42.04	Assesses effectiveness of each media in relation to good leads per dollar spent by tracking the prospects			
			42.05	Removes less effective advertising placements			
	43.	Manages the public relations plan	43.01	Arranges for public relations activities for the business			
			43.02	Provides information to media on business products and activities			
	44.	Manages the sales program	44.01	Selects and recruits sales personnel to put sales program into effect			
			44.02	Develops sales presentation consistent with market plan			
			44.03	Arranges for training of sales people representing the business			
			44.04	Schedules sales activities			
			44.05	Obtains feedback from sales people relating to market acceptance			
			44.06	Develops and establishes closure procedures and an administrative framework for closing a sale			
			44.07	Ensures that sales staff is informed of production problems			
	45.	Manages the client referral plan	45.01	Ensures that the job is done right the first time			
			45.02	Requests acknowledgement of client satisfaction (letter of recommendation)			
			45.03	Sends or provides token of appreciation to customers			
			45.04	Revisits existing clients			
			45.05	Obtains permission to use certain projects for demonstration purposes			
			45.06	Lives up to the business's service policy			
	46.	Qualifies the prospect	46.01	Determines if the type of work proposed suits and is of interest to the business			
			46.02	Determines the seriousness and commitment of the customer			
			46.03	Assesses the competition for the project			
			46.04	Evaluates the time frame of the proposed work and ensures that the schedule can accommodate it			
			46.05	Determines the customer's ability to pay			
	47.	Assesses prospect expectations and needs	47.01	Develops a questionnaire in advance of sales calls designed to elicit information about client needs and expectations			
			47.02	Arranges the time and place for a meeting			
			47.03	Develops a method to obtain answers to questionnaire			
			47.04	Listens to and records customer input			
	48.	Develops sales and / or exit strategies	48.01	Assesses client			
			48.02	Prepares sales presentation			
			48.03	Uses effective closing techniques			
	49.	Obtains client commitment / contract					

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				49.01	Presents a proposal of work to be performed			
				49.02	Discusses details of the proposal with customer			
				49.03	Overcomes objectives that customers might have			
				49.04	Closes the deal and puts in place the mechanism to obtain signed contract			
				49.05	Accepts deposit			
B3.	Financial Management							
		50.	Establishes and maintains an accounting system that can be easily related to industry projects					
				50.01	Chooses an accountant who is familiar with the industry			
				50.02	Establishes accounting procedures which provide information for each project			
				50.03	Establishes accounting procedures which distinguish between fixed and variable overhead costs			
				50.04	Establishes accounting procedures which allow for regular and ongoing review			
				50.05	Explains the basic accounting principles associated with accounts receivable and payable			
				50.06	Maintains the appropriate documentation for accounts receivable and payable			
				50.07	Maintains a system that compares accounts receivable to accounts payable and cash flow			
				50.08	Establishes and maintains collection procedures for accounts receivable			
				50.09	Develops a system to ensure that accounts are paid within the terms outlined in credit agreements			
		51.	Interprets financial statements and reports					
				51.01	Identifies the source of financial statements within the business			
				51.02	Interprets the contents of the balance sheet			
				51.03	Explains the different components of a balance sheet			
				51.04	Explains the concepts of assets and liabilities			
				51.05	Interprets profit and loss statements			
				51.06	Reads and interprets earned surplus or retained earnings statement			
				51.07	Explains some of the basic ratios associated with interpreting financial statement, such as working capital ratio and interest coverage ratio			
		52.	Establishes required financing					
				52.01	Identifies the services and lending limits of banks, mortgage companies, mortgage brokers, credit unions and trust companies			
				52.02	Establishes an effective working relationship with account managers by keeping them informed of progress on specific projects and business in general			
		53.	Negotiates payment terms with suppliers, subcontractors and developers					
				53.01	Determines normal credit arrangements			
				53.02	Negotiates new credit arrangements			
		54.	Sets up and uses a system to control costs at all levels of the business operations					
				54.01	Implements a system for material purchases			
				54.02	Develops a system for field verification of materials and labour bills			
				54.03	Establishes and works within an approved budget			
		55.	Sets up system to control cash flow					

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			55.01	Explains the purpose of a cash flow system		
			55.02	Predicts job costs and identifies points in time where cash resources will be required		
			55.03	Monitors and updates cash flow projections on a regular basis		
			55.04	Establishes lines of credit with different financial institutions		
	56.	Establishes and maintains a system for project cost control				
			56.01	Explains the concept of project cost control		
			56.02	Maintains accurate project costing records, including labour, materials, subcontractors, etc.		
			56.03	Compares actual project costs to budget figures		
			56.04	Makes necessary adjustments to future job estimates as required		
			56.05	Implements a purchase order system or puts in place alternatives to verify that supplier and subcontractor invoices correspond to goods and services		
			56.06	Maintains control over expenditures and productivity on the job site		
	57.	Establishes effective purchasing practices				
			57.01	Develops a needs list by category and alternatives		
			57.02	Investigates all sources of supply		
			57.03	Requests quotations and terms		
			57.04	Compares quotes		
			57.05	Reviews previous pricing		
			57.06	Makes buying decision		
			57.07	Documents purchases (issues P.O.'s)		
B4.	Human Resource Management					
	58.	Determines salary, benefits and incentive packages				
			58.01	Determines base salary rates for each job function - commensurates with duties and responsibilities performed		
			58.02	Determines benefits package to be provided		
			58.03	Holds regular reviews and performance ratings and adjusts salary accordingly		
			58.04	Offers additional bonus and incentive package such as a profit sharing plan		
	59.	Adopts effective recruiting practices				
			59.01	Evaluates the skill level required for a given job		
			59.02	Fills vacant positions		
			59.03	Explains the salary and compensation package to employees		
			59.04	Describes the remittance requirements		
			59.05	Abides by legislation governing employees in the workplace		
			59.06	Abides by the terms of collective agreements as applicable		
	60.	Recognizes the strengths and limitations of employees and assigns them work accordingly				
			60.01	Assesses employee skills and knowledge		
			60.02	Assigns work that challenges employees to do their best		
	61.	Provides clear instructions when assigning tasks				
			61.01	Defines the tasks to be performed clearly		
			61.02	Sets up a time schedule		
			61.03	Delegates a task		
	62.	Prepares evaluation criteria for employee performance				
			62.01	Develops rating system for scoring		
			62.02	Sets time periods for evaluations		
			62.03	Explains requirements to employees		

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63.	Provides skills development and educational upgrading for all employees	62.04	Ties remuneration increase to a promotion as a reward					
		63.01	Identifies career path opportunities for employees					
		63.02	Provides training for new employees or employees being phased into new jobs, ensuring that their performance meet the requirements					
		63.03	Identifies the role of training in phasing employees into positions of increasing responsibility					
		63.04	Determines skills upgrading requirements					
		63.05	Provides skills development and educational upgrading as a means of improving productivity and profitability					
		63.06	Establishes and maintains a skills development schedule					
		63.07	Allows employees to understand the operation and functions of the various parts of the business					
		63.08	Identifies appropriate skills development vehicles and knowledge upgrading programs					
		63.09	Encourages and makes arrangements for staff and self-attendance at courses and seminars					
		63.10	Evaluates benefits resulting from sending employees to upgrading programs					
B5. Project Management								
		64.	Ensures construction conforms to current codes and standards					
		64.01	Acquires the latest version of the Building Code					
		64.02	Attends code related training programs					
		64.03	Ensures all plans and specifications comply with codes					
		64.04	Ensures field staff are knowledgeable of codes and standards					
		65.	Keeps up-to-date with new products and building processes					
		65.01	Acquires information on products at shows					
		65.02	Subscribes to product and building magazines					
		65.03	Attends conference and meetings					
		65.04	Evaluates new products and discusses their application with suppliers and installers					
		66.	Demonstrates how building components work together as a system					
		66.01	Inspects building thoroughly					
		66.02	Identifies the different components of a building					
		66.03	Assesses the impact of renovation activity on the system					
		67.	Develops solutions to problems which result from building activities					
		67.01	Defines and exposes the problem					
		67.02	Develops and decides on the best possible solution					
		67.03	Maintains a rational perspective					
		68.	Performs thorough site investigation, checks on zoning and ensures all required permits are in place					
		68.01	Investigates site for irregularities					
		68.02	Ensures all construction related permits are in place					
		69.	Perform thorough house inspections					
		69.01	Inspects existing house systems					
		69.02	Investigates the parts of the house that will be affected by the proposed renovation					
		70.	Prepares designs, plans and specifications					
		70.01	Represents the design in plans and specifications					

		70.02	Reviews plans and specifications with the customer for approval prior to construction			
	71. Estimates accurately all costs of the project					
		71.01	Employs a standard format for estimating project costs, ensuring that the format is detailed			
		71.02	Checks estimate to ensure that all hard and soft costs have been accounted for			
		71.03	Updates base costs on an ongoing basis			
		71.04	Provides cash allowances if and when specifications have not been adequately detailed or chosen by the home owner			
		71.05	Allows for a contingency as a means of protecting profit margin			
	72. Prepares clear documentation for the bidding and tendering process					
		72.01	Prepares bid packages			
		72.02	Provides bid instructions for subcontractors and suppliers			
		72.03	Prepares clear and accurate documents for tenders			
	73. Complies with contractual requirements					
		73.01	Identifies the major legal requirements of a contract			
		73.02	Identifies the difference between a verbal, a written contract and an interim contract			
		73.03	Ensures that all pages of a contract, plans and specifications are signed and initialed			
		73.04	Identifies addenda to contracts			
		73.05	Identifies those circumstances when it would be appropriate to use a lawyer			
		73.06	Utilizes the appropriate contract for a variety of conditions			
		73.07	Complies with standard clauses of a sales contract			
	74. Prepares clear documentation to ensure an effective bidding and tendering process for subcontractors and suppliers					
		74.01	Prepares tender packages			
		74.02	Provides bid instructions for subcontractors and suppliers			
	75. Prepares contracts to hire subcontractors and suppliers					
		75.01	Ensures contracts reflect terms for supply of goods and / or services to be supplied to site			
		75.02	Includes terms of payment for supply of materials and / or labour			
		75.03	Describes penalties for non-performance			
	76. Plans and schedules the project					
		76.01	Describes the principles of project scheduling			
		76.02	Identifies the steps required to define and complete a job			
		76.03	Schedules project activities with project financing			
		76.04	Ensures materials can be obtained at the required time			
		76.05	Ensures work is scheduled to allow for inspections to be completed prior to the commencing of the next phase			
		76.06	Develops reporting mechanisms to determine project progress in accordance with plan			
	77. Arranges contingency plans to deal with potential problems					
		77.01	Describes the resources available to solve problems that arise during construction			
		77.02	Maintains contingency time in the schedule for problem resolution			
	78. Establishes and maintains an effective working relationship with the clients					
		78.01	Outlines clearly the business's policies and procedures			

			78.02	Explains to your customers the extent and limitations of your business's warranty program			
			78.03	Explains product features and responds to questions			
			78.04	Ensures clients are kept informed of the work in progress			
			78.05	Sets up regular job site meetings to ensure ongoing communication			
			78.06	Trains staff and subcontractors if need arises			
		79.		Addresses and resolves client problems an concerns			
			79.01	Maintains open lines of communication			
			79.02	Shows empathy for client concerns and responds quickly			
			79.03	Responds to clients concerns and complains honestly and diplomatically			
			79.04	Corrects the problem immediately whenever possible			
		80.		Provides after-sales service			
			80.01	Confirms and documents the business's service policy			
			80.02	Thanks client at job completion			
			80.03	Provides customer with warranty certificate			
			80.04	Responds to problems graciously and promptly			
B6.	Project Supervision						
		81.		Checks plans for errors and omissions			
			81.01	Reviews plans and specifications for irregularities or incompleteness			
			81.02	Implements necessary corrections			
		82.		Explains plans and schedules to all site personnel and to the client			
			82.01	Informs all site personnel of the construction schedule			
			82.02	Describes the construction schedule to the client			
		83.		Arranges for and acquires all required materials and labour			
			83.01	Places orders with suppliers and subtrades			
			83.02	Hires required field employees			
		84.		Performs site inspections to monitor job progress and compliance with plans and specifications			
			84.01	Arranges for mandatory inspections as required			
			84.02	Ensures regular staff inspections are conducted as required			
			84.03	Informs staff when inspections will be conducted			
		85.		Supervises activities on the site to make certain they are being performed to business standards			
			85.01	Practices good supervisory skills			
			85.02	Informs trades when slippage is occurring on a project schedule so that they can reschedule other work during the interim			
			85.03	Maintains effective communication links between all site personnel and trades			
			85.04	Demonstrates sensitivity to workers' morale and general concerns			
			85.05	Completes all paperwork associated with work on site			
			85.06	Completes all change orders for a contract			
			85.07	Ensures work site is kept neat, tidy and safe			
			85.08	Ensures work being performed by the subtrades is technically competent and recognizes when substandard work is being done			
			85.09	Ensures level of quality is in line with business policy at all stages of production			
		86.		Implements procedures for controlling site activity			
			86.01	Educates employees on business policy			
			86.02	Reinforces and re-evaluates policy continually			

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	87.	Enforces safe working conditions		
	87.01		Complies with the requirements of Workplace Hazardous Material Information System (WHMIS)	
	87.02		Complies with the requirements of the Occupational Health and Safety Act	
	88.	Participates in project cost control		
	88.01		Implements cost control procedures	
	88.02		Ensures accurate records are maintained	
B7.				
	89.	Educates customers		
	89.01		Outlines clearly the business's policies and procedures	
	89.02		Explains to customers extent and limitations of business's warranty program	
	89.03		Includes clients in initial and ongoing inspections	
	89.04		Explains product features and responds to questions	
	89.05		Prepares clients for a temporary lifestyle change and inconveniences resulting from extensive renovation	
	89.06		Explains job flow procedures and reason for "dead days" (no worker on site)	
	90.	Addresses issue of client accountability		
	90.01		Confirms mutual responsibilities during the job	
	90.02		Initiates an after-sales service program for product / services	
C1.				
	91.	Evaluates whether personal goals are being achieved		
	91.01		Identifies which personal goals are of the greatest importance	
	91.02		Gathers business performance information related to associated business goals	
	91.03		Assesses degree to which goals are being met	
	92.	Assesses whether a business objectives are being met		
	92.01		Gathers relevant information regarding stated business goals	
	92.02		Compares estimated performance with actual performance	
	93.	Determines if services being offered are appropriate		
	93.01		Assesses where income is being generated	
	93.02		Identifies specific services offered by business to customers	
	93.03		Compares income generation to services offered	
	94.	Assesses the approach to business		
	94.01		Determines if time spent by one's self is reasonable and useful	
	94.02		Considers alternative staffing arrangements	
	94.03		Assesses one's self in relation to business growth and advancement	
C2.				
	95.	Determines why prospects came to the business		
	95.01		Develops procedures for tracking prospects	
	95.02		Records responses in a prescribed standard format	
	95.03		Assesses survey results and matches findings to marketing initiatives	

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96.	Determines why prospects purchased or did not purchase the product			96.01	Conducts ongoing evaluation with prospects and customers regarding the purchase decision								
				96.02	Identifies problems with unpopular products								
93.	Reviews market situations / realities			97.01	Prepares detailed project reports covering a one-to-two year period								
				97.02	Determines total sales in the marketplace with total projects sold by the business								
				97.03	Compares sales volume with historical records on a month-to-month basis and by category								
				97.04	Determines actual selling prices throughout the marketplace								
				97.05	Develops criteria to compare similar jobs								
				97.06	Reviews economic indicators on interest rates, job creation and market expansions / contractions								
98.	Compares monthly sales volume with projected sales volume and determines reasons for variances												
				98.01	Gathers accurate monthly sales reports								
				98.02	Compares actual sales to estimated sales								
99.	Determines sales coming from target market												
				99.01	Prepares customer profiles for each product sold								
				99.02	Establishes ratio of estimates to sales								
				99.03	Develops a category analysis (breakdown by job category)								
				99.04	Confirms the profile of the planned target market								
100.	Determines sales resulting from client referral plan												
				100.01	Determines how customers came to your business								
				100.02	Identifies customers referred to business by other customers								
101.	Determines whether business is positioned as planned												
				101.01	Collects information from prospects and customers on their perception of the business								
				101.02	Gathers information from trades, staff and professionals regarding their perception of the business								
C3. Monitoring and Evaluation of the Financial Plan													
102.	Reviews financial reports												
				102.01	Reviews and assesses monthly statements								
				102.02	Ensures that the financial reports are accurate and reflect the true situation (i.e., accrual basis)								
				102.03	Evaluates business performance								
103.	Compares financial reports against budget expectations												
				103.01	Gets current (actual), timely data								
				103.02	Compares the actual financial report to the original budget for variances								
				103.03	Analyzes variances								
				103.04	Develops and executes an action plan								
104.	Prepares final report on each project												
				104.01	Sets up a system to track job costs								
				104.02	Documents the cost estimate for a project and compares it to the actual cost upon completion								
				104.03	Calculates business's profit or loss on a project as a percentage								
				104.04	Determines ways to reduce variances in future projects								
105.	Compares actual margins with expected margins												

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			105.01	Monitors job cost control system on a continual basis		
			105.02	Reviews monthly financial statements		
			105.03	Reviews cost reports on each project		
	106.	Evaluates requirements for cash flow and capital				
			106.01	Monitors payables versus receivables		
			106.02	Establishes cash flow requirements		
			106.03	Satisfies cash flow requirements		
			106.04	Compares actual capital requirements to original estimate		
C4.	Monitoring and Evaluation of the Operating Plan					
	107.	Monitors operating performance indicators				
			107.01	Collects information on employee performance and production efficiencies		
			107.02	Collects information on sales and financial indicators		
	108.	Monitors type and frequency of customer complaints				
			108.01	Develops a centralized record system for logging complaints by job and by stage of work		
			108.02	Develops a system for reporting complaints received, action taken and results achieved on a regular basis		
			108.03	Assesses ability of the business to respond to customer complaints		
	109.	Monitors the effectiveness of problem solving				
			109.01	Assesses number of problems identified in the business from all areas		
			109.02	Assesses the number of complaints directed at the quality of work performed		
			109.03	Analyzes complaints to identify causes of most common complaints		
			109.04	Determines if response and solution to problems are acceptable		
	110.	Develops options for improving business performance				
			110.01	Assesses the business's performance in relation to goals and objectives		
			110.02	Determines those areas which are in need of improvement		
			110.03	Consults with staff to explore options to improve business performance		
			110.04	Lists the options which are available for improving business performance		
	111.	Assesses options and modifies plans				
			111.01	Assesses existing business plan in relation to its suitability for the next business cycle		
			111.02	Assesses options for modifying plans		
			111.03	Revises or modifies existing business plan or prepares new business plan		
	112.	Revises procedures				
			112.01	Implements new procedures consistent with the revised plan		
			112.02	Communicates new systems and procedures with employees and subcontractors		
			112.03	Monitors implementation of the new procedures		
C5.	Monitoring and Evaluation of Human Resources					
			113.	Assesses performance of employees		
			113.01	Evaluates productivity of employees in performing their job		
			113.02	Evaluates how employees work with their peers		

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			113.03	Evaluates employees' performance in relation to the client and trades			
			113.04	Conducts performance review meeting with the employees			
	114. Compares staff salaries with industry / market standards		114.01	Determines industry standards for salaries for various job categories			
			114.02	Determines the comparable salary to pay when including benefits package			
			114.03	Compares the value of the work performed by the employees in relation to industry standards			
	115. Determines effectiveness of training initiatives		115.01	Identifies training activities conducted			
			115.02	Describes expected results from training			
			115.03	Determines employees perspective on training initiatives			
			115.04	Identifies additional training requirements			

SUB-BLOCK	TASK	SUBTASK	Awareness	Knowledge	Skill
A1. Definition of Business Goals					
	1. Establish personal goals				
		1.01 Clarifies the reasons for starting or continuing business			
		1.02 Defines what is to be accomplished			
		1.03 Defines and records achievable and measurable goals for the short and long term			
		1.04 Determines the opportunity costs of investing your money elsewhere			
		1.05 Determines if you are prepared to make the necessary personal sacrifice			
	2. Establishes business goals				
		2.01 Assesses the changing trends and approaches affecting the residential industry			
		2.02 Establishes short - and long - term objectives			
		2.03 Applies personal goals to business goals			
		2.04 Determines financial goals			
		2.05 Determines the desired business image			
		2.06 Develops a business mission statement			
	3. Determines scope of services				
		3.01 Determines type of services being offered in the marketplace			
		3.02 Determines which services are required for the business to reach its objectives			
	4. Determines business approach				
		4.01 Determines the expected size of the business			
		4.02 Determines the form / structure of the business			
		4.03 Determines elements of business operations to be performed in-house and those which will be subcontracted			
		4.04 Determines what tasks to do personally			
A2. Development of Marketing and Sales Plans					
	5. Determines the general market environment				
		5.01 Assesses the market conditions			
		5.02 Identifies market opportunities			
	6. Determines the target market				
		6.01 Determines the needs and wants of the market			
		6.02 Defines which group of purchasers would be interested in the product			
		6.03 Clearly defines which purchaser groups you want to have an interest in your product			
		6.04 Defines the type of people in the industry one wants to work with			
	7. Determines where the business should be positioned				
		7.01 Determines the manner in which the business provides greater value than that of competitors			
		7.02 Decides how target group prospects should perceive your business / product and compare it to others			
		7.03 Gathers feedback from the target group concerning the business position			
	8. Develops a pricing strategy				
		8.01 Determines projected cost of products including mark-up			
		8.02 Determines market prices for comparable products			
		8.03 Establishes asking price for products, based on business positioning, marketing strategy and margin requirements			

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9.	Develops an original strategy for the marketing activities	9.01	Decides on the message that you want to convey to the target audience		
		9.02	Identifies techniques to effectively communicate the message to the target market		
		9.03	Creates a unique marketing image that makes your product and business stand out from all others		
10.	Develops a sales strategy for the business				
		10.01	Develops the basic tasks associated with selling		
		10.02	Identifies the advantages and disadvantages between selling yourself, using your staff and using an agent		
		10.03	Determines at what point of the year you will sell your products		
		10.04	Determines the effect upon sales of site presentation and business		
11.	Develops a public relations plan				
		11.01	Demonstrates the importance of public relations		
		11.02	Determines public relations options best suited to your marketing strategy and business positioning		
		11.03	Prepares a public relations plan		
		11.04	Develops a budget for public relations activities		
12.	Determines the marketing tools to be used				
		12.01	Decides on the kind of methods one will use to reach the target groups with the message about the product and business		
		12.02	Determines the amount of money to be allocated to marketing		
		12.03	Determines when each method will be employed and over what time period		
		12.04	Determines the optimum marketing tool for the product / business using cost effectiveness data		
13.	Develops an advertising plan				
		13.01	Assesses objectives		
		13.02	Allocates budget		
		13.03	Develops a monthly advertising plan		
		13.04	Evaluates and selects medium		
		13.05	Develops advertising materials consistent with marketing strategy		
		13.06	Develops copy - for letterhead, business cards, advertising, signage and other promotional vehicles - consistent with the corporate image		
		13.07	Selects the market areas and media for placement of advertising		
		13.08	Establishes a purchasing plan		
		13.09	Obtains co-operation and financial support from suppliers		
		13.10	Develops a procedure for tracking results		
14.	Develops a client referral plan				
		14.01	Determines how previous clients can assist in marketing the business		
		14.02	Identifies alternative means of communicating client satisfaction in the business's product and / or service to the target market		
		14.03	Communicates the client referral plan to the staff, subcontractors and prospective clients		
A3.	Development of a Financial Plan				
15.	Prepares pro forma income statements				
		15.01	Projects expected gross revenue from sales of the products and services		
		15.02	Determines the cost of producing the product or providing the service		
		15.03	Estimates the cost of operating the business		

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	16.	Develops pro forma balance sheet	15.04	Determines the expected net income					
			15.05	Determines the risk involved in working to the projected level					
			16.01	Identifies all assets of the business					
			16.02	Identifies all liabilities of the business					
			16.03	Determines the shareholder's equity and retained earnings					
	17.	Prepares cash flow estimates							
			17.01	Determines the timing and amount of payments for goods, services and office operations					
			17.02	Estimates timing of income to be received					
			17.03	Determines the amount of bridge (temporary) financing required to satisfy the expected payment schedule					
	18.	Develops a long-term financial plan							
			18.01	Estimates future sales possibilities					
			18.02	Determines requirement for capital and establishes plan for acquisition					
			18.03	Assesses the effects of recessions, booms and normal industry cycles					
			18.04	Estimates return on investment					
	19.	Determines required mark-ups							
			19.01	Determines projected cost of production					
			19.02	Determines projected cost of operating the business					
			19.03	Determines projected business profit					
			19.04	Determines required mark-up of production costs to cover operating costs and desired profit					
			19.05	Alters mark-up based on market conditions					
	A4.	Development of an Operating Plan							
	20.	Develops a code of ethics to cover all business operations							
			20.01	Recognizes the importance of ethical standards in relation to long-term reputation					
			20.02	Determines ethical standard for working with employees, subcontractors, prospects and clients					
	21.	Develops a land / property acquisition plan							
			21.01	Determines type of land / property required to support your market position					
			21.02	Determines availability of suitable land / property					
	22.	Develops a design and drafting plan							
			22.01	Determines design and drafting requirements					
			22.02	Assesses computerized design and drafting options					
	23.	Develops an estimating plan							
			23.01	Determines cost estimating methods					
			23.02	Determines a procedure for gathering bids from trades and suppliers					
	24.	Develops a contract administration plan							
			24.01	Establishes change order procedures					
			24.02	Develops a contract package					
			24.03	Explains the major legal requirements of a contract					
			24.04	Explains the difference between a verbal, a written contract and an interim contract					
			24.05	Signs and initials all pages of a contract, plans and specifications					
	25.	Develops a quality control plan							
			25.01	Establishes quality standards for the business					
			25.02	Develops inspection procedures					
	26.	Develops a customer service program							
			26.01	Establishes a philosophy for customer service					

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					26.02	Develops customer service policies		
					26.03	Establishes a level of customer service		
		27.	Develops a waste management plan					
					27.01	Reviews waste stream being generated from construction activities		
					27.02	Determines where wastes can be reduced within the project		
					27.03	Determines which materials can be sent to recycling centres		
A5.	Development of a Human Resource Plan							
		28.	Determines the human resource needs					
					28.01	Arranges groups of tasks into job functions		
					28.02	Determines whether work is to be performed by in-house staff or by trade or professional subcontractors		
					28.03	Determines desired staffing complement		
					28.04	Identifies skills required of the key personnel		
					28.05	Plans the long-term approach to skills upgrading		
					28.06	Determines priorities to be used when establishing relationships with company employees, such as: profitability, quality control, business approach and ethics		
		29.	Prepares job descriptions for all employees					
					29.01	Assigns job functions to employees		
					29.02	Determines responsibilities and authority for each job		
		30.	Prepares plans to ensure the business has sufficient skilled human resources					
					30.01	Determines which skills should ideally be provided by employees of the business		
					30.02	Determines the training required to provide the needed skills and knowledge to the owner		
					30.03	Assesses the skills and knowledge that are available through the use of contract labour		
					30.04	Determines how human resources will be acquired		
B1.	Business Management							
		31.	Organizes and equips the business office					
					31.01	Develops an organizational chart		
					31.02	Develops internal office systems		
					31.03	Determines equipment and supplies required		
					31.04	Capitalizes on office equipment and product features to enhance efficiency		
					31.05	Recognizes the type of work for which a computer is most suited in the industry		
					31.06	Decides whether the operation would benefit from the use of a computer		
					31.07	Determines how a computer would be introduced into the business operation		
		32.	Develops clear instructions relating to job functions and tasks being delegated					
					32.01	Defines the task clearly - both what is to be done and why		
					32.02	Determines whether the individual can adequately perform the task		
					32.03	Defines clearly the level and limits of authority delegated		
					32.04	Provides assistance, as required to ensure that the task will be satisfactorily completed		
					32.05	Ensures that problems are clearly communicated		
		33.	Assesses value of information required to manage business					
					33.01	Decides when, and what, information is required in order to manage the operations of the business		
					33.02	Collects the necessary information		

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			41.02	Assesses the extent to which the individuals functioning within the business reflect the desired image			
			41.03	Assesses the extent of the actual business image to ensure it reflects the desired image			
			41.04	Employs business practices that reflect personal and client sensitiveness			
			41.05	Obtains and assesses feedback concerning the image of the business			
	42.	Manages the advertising plan					
			42.01	Oversees development and production of advertising materials to ensure consistency of message			
			42.02	Places advertising in selected media as applicable			
			42.03	Evaluates placement costs in relation to marketing budget			
			42.04	Assesses effectiveness of each media in relation to good leads per dollar spent by tracking the prospects			
			42.05	Removes less effective advertising placements			
	43.	Manages the public relations plan					
			43.01	Arranges for public relations activities for the business			
			43.02	Provides information to media on business products and activities			
	44.	Manages the sales program					
			44.01	Selects and recruits sales personnel to put sales program into effect			
			44.02	Develops sales presentation consistent with market plan			
			44.03	Arranges for training of sales people representing the business			
			44.04	Schedules sales activities			
			44.05	Obtains feedback from sales people relating to market acceptance			
			44.06	Develops and establishes closure procedures and an administrative framework for closing a sale			
			44.07	Ensures that sales staff is informed of production problems			
	45.	Manages the client referral plan					
			45.01	Ensures that the job is done right the first time			
			45.02	Requests acknowledgement of client satisfaction (letter of recommendation)			
			45.03	Sends or provides token of appreciation to customers			
			45.04	Revisits existing clients			
			45.05	Obtains permission to use certain projects for demonstration purposes			
			45.06	Lives up to the business's service policy			
	46.	Qualifies the prospect					
			46.01	Determines if the type of work proposed suits and is of interest to the business			
			46.02	Determines the seriousness and commitment of the customer			
			46.03	Assesses the competition for the project			
			46.04	Evaluates the time frame of the proposed work and ensures that the schedule can accommodate it			
			46.05	Determines the customer's ability to pay			
	47.	Assesses prospect expectations and needs					
			47.01	Develops a questionnaire in advance of sales calls designed to elicit information about client needs and expectations			
			47.02	Arranges the time and place for a meeting			
			47.03	Develops a method to obtain answers to questionnaire			
			47.04	Listens to and records customer input			
	48.	Develops sales and / or exit strategies					
			48.01	Assesses client			
			48.02	Prepares sales presentation			
			48.03	Uses effective closing techniques			
	49.	Obtains client commitment / contract					

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			49.01	Presents a proposal of work to be performed		
			49.02	Discusses details of the proposal with customer		
			49.03	Overcomes objectives that customers might have		
			49.04	Closes the deal and puts in place the mechanism to obtain signed contract		
			49.05	Accepts deposit		
B3. Financial Management						
	50. Establishes and maintains an accounting system that can be easily related to industry projects					
			50.01	Chooses an accountant who is familiar with the industry		
			50.02	Establishes accounting procedures which provide information for each project		
			50.03	Establishes accounting procedures which distinguish between fixed and variable overhead costs		
			50.04	Establishes accounting procedures which allow for regular and ongoing review		
			50.05	Explains the basic accounting principles associated with accounts receivable and payable		
			50.06	Maintains the appropriate documentation for accounts receivable and payable		
			50.07	Maintains a system that compares accounts receivable to accounts payable and cash flow		
			50.08	Establishes and maintains collection procedures for accounts receivable		
			50.09	Develops a system to ensure that accounts are paid within the terms outlined in credit agreements		
	51. Interprets financial statements and reports					
			51.01	Identifies the source of financial statements within the business		
			51.02	Interprets the contents of the balance sheet		
			51.03	Explains the different components of a balance sheet		
			51.04	Explains the concepts of assets and liabilities		
			51.05	Interprets profit and loss statements		
			51.06	Reads and interprets earned surplus or retained earnings statement		
			51.07	Explains some of the basic ratios associated with interpreting financial statement, such as working capital ratio and interest coverage ratio		
	52. Establishes required financing					
			52.01	Identifies the services and lending limits of banks, mortgage companies, mortgage brokers, credit unions and trust companies		
			52.02	Establishes an effective working relationship with account managers by keeping them informed of progress on specific projects and business in general		
	53. Negotiates payment terms with suppliers, subcontractors and developers					
			53.01	Determines normal credit arrangements		
			53.02	Negotiates new credit arrangements		
	54. Sets up and uses a system to control costs at all levels of the business operations					
			54.01	Implements a system for material purchases		
			54.02	Develops a system for field verification of materials and labour bills		
			54.03	Establishes and works within an approved budget		
	55. Sets up system to control cash flow					

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			55.01	Explains the purpose of a cash flow system		
			55.02	Predicts job costs and identifies points in time where cash resources will be required		
			55.03	Monitors and updates cash flow projections on a regular basis		
			55.04	Establishes lines of credit with different financial institutions		
	56.	Establishes and maintains a system for project cost control				
			56.01	Explains the concept of project cost control		
			56.02	Maintains accurate project costing records, including labour, materials, subcontractors, etc.		
			56.03	Compares actual project costs to budget figures		
			56.04	Makes necessary adjustments to future job estimates as required		
			56.05	Implements a purchase order system or puts in place alternatives to verify that supplier and subcontractor invoices correspond to goods and services		
			56.06	Maintains control over expenditures and productivity on the job site		
	57.	Establishes effective purchasing practices				
			57.01	Develops a needs list by category and alternatives		
			57.02	Investigates all sources of supply		
			57.03	Requests quotations and terms		
			57.04	Compares quotes		
			57.05	Reviews previous pricing		
			57.06	Makes buying decision		
			57.07	Documents purchases (issues P.O.'s)		
B4.	Human Resource Management					
	58.	Determines salary, benefits and incentive packages				
			58.01	Determines base salary rates for each job function - commensurates with duties and responsibilities performed		
			58.02	Determines benefits package to be provided		
			58.03	Holds regular reviews and performance ratings and adjusts salary accordingly		
			58.04	Offers additional bonus and incentive package such as a profit sharing plan		
	59.	Adopts effective recruiting practices				
			59.01	Evaluates the skill level required for a given job		
			59.02	Fills vacant positions		
			59.03	Explains the salary and compensation package to employees		
			59.04	Describes the remittance requirements		
			59.05	Abides by legislation governing employees in the workplace		
			59.06	Abides by the terms of collective agreements as applicable		
	60.	Recognizes the strengths and limitations of employees and assigns them work accordingly				
			60.01	Assesses employee skills and knowledge		
			60.02	Assigns work that challenges employees to do their best		
	61.	Provides clear instructions when assigning tasks				
			61.01	Defines the tasks to be performed clearly		
			61.02	Sets up a time schedule		
			61.03	Delegates a task		
	62.	Prepares evaluation criteria for employee performance				
			62.01	Develops rating system for scoring		
			62.02	Sets time periods for evaluations		
			62.03	Explains requirements to employees		

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63.	Provides skills development and educational upgrading for all employees		62.04	Ties remuneration increase to a promotion as a reward										
			63.01	Identifies career path opportunities for employees										
			63.02	Provides training for new employees or employees being phased into new jobs, ensuring that their performance meet the requirements										
			63.03	Identifies the role of training in phasing employees into positions of increasing responsibility										
			63.04	Determines skills upgrading requirements										
			63.05	Provides skills development and educational upgrading as a means of improving productivity and profitability										
			63.06	Establishes and maintains a skills development schedule										
			63.07	Allows employees to understand the operation and functions of the various parts of the business										
			63.08	Identifies appropriate skills development vehicles and knowledge upgrading programs										
			63.09	Encourages and makes arrangements for staff and self-attendance at courses and seminars										
			63.10	Evaluates benefits resulting from sending employees to upgrading programs										
B5. Project Management														
			64.	Ensures construction conforms to current codes and standards										
			64.01	Acquires the latest version of the Building Code										
			64.02	Attends code related training programs										
			64.03	Ensures all plans and specifications comply with codes										
			64.04	Ensures field staff are knowledgeable of codes and standards										
			65.	Keeps up-to-date with new products and building processes										
			65.01	Acquires information on products at shows										
			65.02	Subscribes to product and building magazines										
			65.03	Attends conference and meetings										
			65.04	Evaluates new products and discusses their application with suppliers and installers										
			66.	Demonstrates how building components work together as a system										
			66.01	Inspects building thoroughly										
			66.02	Identifies the different components of a building										
			66.03	Assesses the impact of renovation activity on the system										
			67.	Develops solutions to problems which result from building activities										
			67.01	Defines and exposes the problem										
			67.02	Develops and decides on the best possible solution										
			67.03	Maintains a rational perspective										
			68.	Performs thorough site investigation, checks on zoning and ensures all required permits are in place										
			68.01	Investigates site for irregularities										
			68.02	Ensures all construction related permits are in place										
			69.	Perform thorough house inspections										
			69.01	Inspects existing house systems										
			69.02	Investigates the parts of the house that will be affected by the proposed renovation										
			70.	Prepares designs, plans and specifications										
			70.01	Represents the design in plans and specifications										

			70.02	Reviews plans and specifications with the customer for approval prior to construction	
	71. Estimates accurately all costs of the project				
			71.01	Employs a standard format for estimating project costs, ensuring that the format is detailed	
			71.02	Checks estimate to ensure that all hard and soft costs have been accounted for	
			71.03	Updates base costs on an ongoing basis	
			71.04	Provides cash allowances if and when specifications have not been adequately detailed or chosen by the home owner	
			71.05	Allows for a contingency as a means of protecting profit margin	
	72. Prepares clear documentation for the bidding and tendering process				
			72.01	Prepares bid packages	
			72.02	Provides bid instructions for subcontractors and suppliers	
			72.03	Prepares clear and accurate documents for tenders	
	73. Complies with contractual requirements				
			73.01	Identifies the major legal requirements of a contract	
			73.02	Identifies the difference between a verbal, a written contract and an interim contract	
			73.03	Ensures that all pages of a contract, plans and specifications are signed and initialed	
			73.04	Identifies addenda to contracts	
			73.05	Identifies those circumstances when it would be appropriate to use a lawyer	
			73.06	Utilizes the appropriate contract for a variety of conditions	
			73.07	Complies with standard clauses of a sales contract	
	74. Prepares clear documentation to ensure an effective bidding and tendering process for subcontractors and suppliers				
			74.01	Prepares tender packages	
			74.02	Provides bid instructions for subcontractors and suppliers	
	75. Prepares contracts to hire subcontractors and suppliers				
			75.01	Ensures contracts reflect terms for supply of goods and / or services to be supplied to site	
			75.02	Includes terms of payment for supply of materials and / or labour	
			75.03	Describes penalties for non-performance	
	76. Plans and schedules the project				
			76.01	Describes the principles of project scheduling	
			76.02	Identifies the steps required to define and complete a job	
			76.03	Schedules project activities with project financing	
			76.04	Ensures materials can be obtained at the required time	
			76.05	Ensures work is scheduled to allow for inspections to be completed prior to the commencing of the next phase	
			76.06	Develops reporting mechanisms to determine project progress in accordance with plan	
	77. Arranges contingency plans to deal with potential problems				
			77.01	Describes the resources available to solve problems that arise during construction	
			77.02	Maintains contingency time in the schedule for problem resolution	
	78. Establishes and maintains an effective working relationship with the clients				
			78.01	Outlines clearly the business's policies and procedures	

			78.02	Explains to your customers the extent and limitations of your business's warranty program				
			78.03	Explains product features and responds to questions				
			78.04	Ensures clients are kept informed of the work in progress				
			78.05	Sets up regular job site meetings to ensure ongoing communication				
			78.06	Trains staff and subcontractors if need arises				
		79.		Addresses and resolves client problems an concerns				
			79.01	Maintains open lines of communication				
			79.02	Shows empathy for client concerns and responds quickly				
			79.03	Responds to clients concerns and complains honestly and diplomatically				
			79.04	Corrects the problem immediately whenever possible				
		80.		Provides after-sales service				
			80.01	Confirms and documents the business's service policy				
			80.02	Thanks client at job completion				
			80.03	Provides customer with warranty certificate				
			80.04	Responds to problems graciously and promptly				
	B6. Project Supervision							
		81.		Checks plans for errors and omissions				
			81.01	Reviews plans and specifications for irregularities or incompleteness				
			81.02	Implements necessary corrections				
		82.		Explains plans and schedules to all site personnel and to the client				
			82.01	Informs all site personnel of the construction schedule				
			82.02	Describes the construction schedule to the client				
		83.		Arranges for and acquires all required materials and labour				
			83.01	Places orders with suppliers and subtrades				
			83.02	Hires required field employees				
		84.		Performs site inspections to monitor job progress and compliance with plans and specifications				
			84.01	Arranges for mandatory inspections as required				
			84.02	Ensures regular staff inspections are conducted as required				
			84.03	Informs staff when inspections will be conducted				
		85.		Supervises activities on the site to make certain they are being performed to business standards				
			85.01	Practices good supervisory skills				
			85.02	Informs trades when slippage is occurring on a project schedule so that they can reschedule other work during the interim				
			85.03	Maintains effective communication links between all site personnel and trades				
			85.04	Demonstrates sensitivity to workers' morale and general concerns				
			85.05	Completes all paperwork associated with work on site				
			85.06	Completes all change orders for a contract				
			85.07	Ensures work site is kept neat, tidy and safe				
			85.08	Ensures work being performed by the subtrades is technically competent and recognizes when standard work is being done				
			85.09	Ensures level of quality is in line with business policy at all stages of production				
		86.		Implements procedures for controlling site activity				
			86.01	Educates employees on business policy				
			86.02	Reinforces and re-evaluates policy continually				

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			86.03	Makes decisions based on business policy			
			86.04	Provides rationale for policies			
			86.05	Uses purchase order systems			
			86.06	Maintains labour and subtrade reports (scheduling and financial)			
			86.07	Monitors progress and compares to original schedule			
			86.08	Tracks materials not being used			
		87.		Enforces safe working conditions			
			87.01	Complies with the requirements of Workplace Hazardous Material Information System (WHMIS)			
			87.02	Complies with the requirements of the Occupational Health and Safety Act			
			88.01	Implements cost control procedures			
			88.02	Ensures accurate records are maintained			
B7.	Client Relations						
		89.		Educates customers			
			89.01	Outlines clearly the business's policies and procedures			
			89.02	Explains to customers extent and limitations of business's warranty program			
			89.03	Includes clients in initial and ongoing inspections			
			89.04	Explains product features and responds to questions			
			89.05	Prepares clients for a temporary lifestyle change and inconveniences resulting from extensive renovation			
			89.06	Explains job flow procedures and reason for "dead days" (no worker on site)			
		90.		Addresses issue of client accountability			
			90.01	Confirms mutual responsibilities during the job			
			90.02	Initiates an after-sales service program for product / services			
C1.	Monitoring and Evaluation of Objectives						
		91.		Evaluates whether personal goals are being achieved			
			91.01	Identifies which personal goals are of the greatest importance			
			91.02	Gathers business performance information related to associated business goals			
			91.03	Assesses degree to which goals are being met			
		92.		Assesses whether a business objectives are being met			
			92.01	Gathers relevant information regarding stated business goals			
			92.02	Compares estimated performance with actual performance			
		93.		Determines if services being offered are appropriate			
			93.01	Assesses where income is being generated			
			93.02	Identifies specific services offered by business to customers			
			93.03	Compares income generation to services offered			
		94.		Assesses the approach to business			
			94.01	Determines if time spent by one's self is reasonable and useful			
			94.02	Considers alternative staffing arrangements			
			94.03	Assesses one's self in relation to business growth and advancement			
C2.	Monitoring and Evaluation of Marketing and Sales Plans						
		95.		Determines why prospects came to the business			
			95.01	Develops procedures for tracking prospects			
			95.02	Records responses in a prescribed standard format			
			95.03	Assesses survey results and matches findings to marketing initiatives			

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96.	Determines why prospects purchased or did not purchase the product	96.01	Conducts ongoing evaluation with prospects and customers regarding the purchase decision		
		96.02	Identifies problems with unpopular products		
93.	Reviews market situations / realities	97.01	Prepares detailed project reports covering a one-to-two year period		
		97.02	Determines total sales in the marketplace with total projects sold by the business		
		97.03	Compares sales volume with historical records on a month-to-month basis and by category		
		97.04	Determines actual selling prices throughout the marketplace		
		97.05	Develops criteria to compare similar jobs		
		97.06	Reviews economic indicators on interest rates, job creation and market expansions / contractions		
98.	Compares monthly sales volume with projected sales volume and determines reasons for variances				
		98.01	Gathers accurate monthly sales reports		
		98.02	Compares actual sales to estimated sales		
99.	Determines sales coming from target market				
		99.01	Prepares customer profiles for each product sold		
		99.02	Establishes ratio of estimates to sales		
		99.03	Develops a category analysis (breakdown by job category)		
		99.04	Confirms the profile of the planned target market		
100.	Determines sales resulting from client referral plan				
		100.01	Determines how customers came to your business		
		100.02	Identifies customers referred to business by other customers		
101.	Determines whether business is positioned as planned				
		101.01	Collects information from prospects and customers on their perception of the business		
		101.02	Gathers information from trades, staff and professionals regarding their perception of the business		
C3. Monitoring and Evaluation of the Financial Plan					
102.	Reviews financial reports				
		102.01	Reviews and assesses monthly statements		
		102.02	Ensures that the financial reports are accurate and reflect the true situation (i.e., accrual basis)		
		102.03	Evaluates business performance		
103.	Compares financial reports against budget expectations				
		103.01	Gets current (actual), timely data		
		103.02	Compares the actual financial report to the original budget for variances		
		103.03	Analyzes variances		
		103.04	Develops and executes an action plan		
104.	Prepares final report on each project				
		104.01	Sets up a system to track job costs		
		104.02	Documents the cost estimate for a project and compares it to the actual cost upon completion		
		104.03	Calculates business's profit or loss on a project as a percentage		
		104.04	Determines ways to reduce variances in future projects		
105.	Compares actual margins with expected margins				

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			105.01	Monitors job cost control system on a continual basis		
			105.02	Reviews monthly financial statements		
			105.03	Reviews cost reports on each project		
	106.	Evaluates requirements for cash flow and capital				
			106.01	Monitors payables versus receivables		
			106.02	Establishes cash flow requirements		
			106.03	Satisfies cash flow requirements		
			106.04	Compares actual capital requirements to original estimate		
C4.	Monitoring and Evaluation of the Operating Plan					
	107.	Monitors operating performance indicators				
			107.01	Collects information on employee performance and production efficiencies		
			107.02	Collects information on sales and financial indicators		
	108.	Monitors type and frequency of customer complaints				
			108.01	Develops a centralized record system for logging complaints by job and by stage of work		
			108.02	Develops a system for reporting complaints received, action taken and results achieved on a regular basis		
			108.03	Assesses ability of the business to respond to customer complaints		
	109.	Monitors the effectiveness of problem solving				
			109.01	Assesses number of problems identified in the business from all areas		
			109.02	Assesses the number of complaints directed at the quality of work performed		
			109.03	Analyzes complaints to identify causes of most common complaints		
			109.04	Determines if response and solution to problems are acceptable		
	110.	Develops options for improving business performance				
			110.01	Assesses the business's performance in relation to goals and objectives		
			110.02	Determines those areas which are in need of improvement		
			110.03	Consults with staff to explore options to improve business performance		
			110.04	Lists the options which are available for improving business performance		
	111.	Assesses options and modifies plans				
			111.01	Assesses existing business plan in relation to its suitability for the next business cycle		
			111.02	Assesses options for modifying plans		
			111.03	Revises or modifies existing business plan or prepares new business plan		
	112.	Revises procedures				
			112.01	Implements new procedures consistent with the revised plan		
			112.02	Communicates new systems and procedures with employees and subcontractors		
			112.03	Monitors implementation of the new procedures		
C5.	Monitoring and Evaluation of Human Resources					
			113.	Assesses performance of employees		
			113.01	Evaluates productivity of employees in performing their job		
			113.02	Evaluates how employees work with their peers		

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			113.03	Evaluates employees' performance in relation to the client and trades Conducts performance review meeting with the employees			
			113.04				
	114. Compares staff salaries with industry / market standards		114.01	Determines industry standards for salaries for various job categories Determines the comparable salary to pay when including benefits package Compares the value of the work performed by the employees in relation to industry standards			
			114.02				
			114.03				
	115. Determines effectiveness of training initiatives		115.01	Identifies training activities conducted			
			115.02	Describes expected results from training			
			115.03	Determines employees perspective on training initiatives			
			115.04	Identifies additional training requirements			

SUB-BLOCK	TASK	SUBTASK	Awareness	Knowledge	Skill
A1. Definition of Business Goals					
	1. Establish personal goals				
		1.01 Clarifies the reasons for starting or continuing business			
		1.02 Defines what is to be accomplished			
		1.03 Defines and records achievable and measurable goals for the short and long term			
		1.04 Determines the opportunity costs of investing your money elsewhere			
		1.05 Determines if you are prepared to make the necessary personal sacrifice			
	2. Establishes business goals				
		2.01 Assesses the changing trends and approaches affecting the residential industry			
		2.02 Establishes short - and long - term objectives			
		2.03 Applies personal goals to business goals			
		2.04 Determines financial goals			
		2.05 Determines the desired business image			
		2.06 Develops a business mission statement			
	3. Determines scope of services				
		3.01 Determines type of services being offered in the marketplace			
		3.02 Determines which services are required for the business to reach its objectives			
	4. Determines business approach				
		4.01 Determines the expected size of the business			
		4.02 Determines the form / structure of the business			
		4.03 Determines elements of business operations to be performed in-house and those which will be subcontracted			
		4.04 Determines what tasks to do personally			
A2. Development of Marketing and Sales Plans					
	5. Determines the general market environment				
		5.01 Assesses the market conditions			
		5.02 Identifies market opportunities			
	6. Determines the target market				
		6.01 Determines the needs and wants of the market			
		6.02 Defines which group of purchasers would be interested in the product			
		6.03 Clearly defines which purchaser groups you want to have an interest in your product			
		6.04 Defines the type of people in the industry one wants to work with			
	7. Determines where the business should be positioned				
		7.01 Determines the manner in which the business provides greater value than that of competitors			
		7.02 Decides how target group prospects should perceive your business / product and compare it to others			
		7.03 Gathers feedback from the target group concerning the business position			
	8. Develops a pricing strategy				
		8.01 Determines projected cost of products including mark-up			
		8.02 Determines market prices for comparable products			
		8.03 Establishes asking price for products, based on business positioning, marketing strategy and margin requirements			

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	9. Develops an original strategy for the marketing activities	Decides on the message that you want to convey to the target audience Identifies techniques to effectively communicate the message to the target market Creates a unique marketing image that makes your product and business stand out from all others		
	9.01			
	9.02			
	9.03			
10.	Develops a sales strategy for the business			
	10.01	Develops the basic tasks associated with selling		
	10.02	Identifies the advantages and disadvantages between selling yourself, using your staff and using an agent		
	10.03	Determines at what point of the year you will sell your products		
	10.04	Determines the effect upon sales of site presentation and business		
11.	Develops a public relations plan			
	11.01	Demonstrates the importance of public relations		
	11.02	Determines public relations options best suited to your marketing strategy and business positioning		
	11.03	Prepares a public relations plan		
	11.04	Develops a budget for public relations activities		
12.	Determines the marketing tools to be used			
	12.01	Decides on the kind of methods one will use to reach the target groups with the message about the product and business		
	12.02	Determines the amount of money to be allocated to marketing		
	12.03	Determines when each method will be employed and over what time period		
	12.04	Determines the optimum marketing tool for the product / business using cost effectiveness data		
13.	Develops an advertising plan			
	13.01	Assesses objectives		
	13.02	Allocates budget		
	13.03	Develops a monthly advertising plan		
	13.04	Evaluates and selects medium		
	13.05	Develops advertising materials consistent with marketing strategy		
	13.06	Develops copy - for letterhead, business cards, advertising, signage and other promotional vehicles - consistent with the corporate image		
	13.07	Selects the market areas and media for placement of advertising		
	13.08	Establishes a purchasing plan		
	13.09	Obtains co-operation and financial support from suppliers		
	13.10	Develops a procedure for tracking results		
14.	Develops a client referral plan			
	14.01	Determines how previous clients can assist in marketing the business		
	14.02	Identifies alternative means of communicating client satisfaction in the business' s product and / or service to the target market		
	14.03	Communicates the client referral plan to the staff, subcontractors and prospective clients		
A3.	Development of a Financial Plan			
	15.	Prepares pro forma income statements		
	15.01	Projects expected gross revenue from sales of the products and services		
	15.02	Determines the cost of producing the product or providing the service		
	15.03	Estimates the cost of operating the business		

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				15.04	Determines the expected net income			
				15.05	Determines the risk involved in working to the projected level			
	16.		Develops pro forma balance sheet	16.01	Identifies all assets of the business			
				16.02	Identifies all liabilities of the business			
				16.03	Determines the shareholder's equity and retained earnings			
	17.		Prepares cash flow estimates	17.01	Determines the timing and amount of payments for goods, services and office operations			
				17.02	Estimates timing of income to be received			
				17.03	Determines the amount of bridge (temporary) financing required to satisfy the expected payment schedule			
	18.		Develops a long-term financial plan	18.01	Estimates future sales possibilities			
				18.02	Determines requirement for capital and establishes plan for acquisition			
				18.03	Assesses the effects of recessions, booms and normal industry cycles			
				18.04	Estimates return on investment			
	19.		Determines required mark-ups	19.01	Determines projected cost of production			
				19.02	Determines projected cost of operating the business			
				19.03	Determines projected business profit			
				19.04	Determines required mark-up of production costs to cover operating costs and desired profit			
				19.05	Alters mark-up based on market conditions			
	A4. Development of an Operating Plan							
			20. Develops a code of ethics to cover all business operations	20.01	Recognizes the importance of ethical standards in relation to long-term reputation			
				20.02	Determines ethical standard for working with employees, subcontractors, prospects and clients			
			21. Develops a land / property acquisition plan					
				21.01	Determines type of land / property required to support your market position			
				21.02	Determines availability of suitable land / property			
			22. Develops a design and drafting plan	22.01	Determines design and drafting requirements			
				22.02	Assesses computerized design and drafting options			
			23. Develops an estimating plan					
				23.01	Determines cost estimating methods			
				23.02	Determines a procedure for gathering bids from trades and suppliers			
			24. Develops a contract administration plan					
				24.01	Establishes change order procedures			
				24.02	Develops a contract package			
				24.03	Explains the major legal requirements of a contract			
				24.04	Explains the difference between a verbal, a written contract and an interim contract			
				24.05	Signs and initials all pages of a contract, plans and specifications			
			25. Develops a quality control plan					
				25.01	Establishes quality standards for the business			
				25.02	Develops inspection procedures			
			26. Develops a customer service program					
				26.01	Establishes a philosophy for customer service			

		26.02	Develops customer service policies		
		26.03	Establishes a level of customer service		
	27.		Develops a waste management plan		
		27.01	Reviews waste stream being generated from construction activities		
		27.02	Determines where wastes can be reduced within the project		
		27.03	Determines which materials can be sent to recycling centres		
A5.			Development of a Human Resource Plan		
	28.		Determines the human resource needs		
		28.01	Arranges groups of tasks into job functions		
		28.02	Determines whether work is to be performed by in-house staff or by trade or professional subcontractors		
		28.03	Determines desired staffing complement		
		28.04	Identifies skills required of the key personnel		
		28.05	Plans the long-term approach to skills upgrading		
		28.06	Determines priorities to be used when establishing relationships with company employees, such as: profitability, quality control, business approach and ethics		
	29.		Prepares job descriptions for all employees		
		29.01	Assigns job functions to employees		
		29.02	Determines responsibilities and authority for each job		
	30.		Prepares plans to ensure the business has sufficient skilled human resources		
		30.01	Determines which skills should ideally be provided by employees of the business		
		30.02	Determines the training required to provide the needed skills and knowledge to the owner		
		30.03	Assesses the skills and knowledge that are available through the use of contract labour		
		30.04	Determines how human resources will be acquired		
	B1.		Business Management		
		31.	Organizes and equips the business office		
		31.01	Develops an organizational chart		
		31.02	Develops internal office systems		
		31.03	Determines equipment and supplies required		
		31.04	Capitalizes on office equipment and product features to enhance efficiency		
		31.05	Recognizes the type of work for which a computer is most suited in the industry		
		31.06	Decides whether the operation would benefit from the use of a computer		
		31.07	Determines how a computer would be introduced into the business operation		
	32.		Develops clear instructions relating to job functions and tasks being delegated		
		32.01	Defines the task clearly - both what is to be done and why		
		32.02	Determines whether the individual can adequately perform the task		
		32.03	Defines clearly the level and limits of authority delegated		
		32.04	Provides assistance, as required to ensure that the task will be satisfactorily completed		
		32.05	Ensures that problems are clearly communicated		
	33.		Assesses value of information required to manage business		
		33.01	Decides when, and what, information is required in order to manage the operations of the business		
		33.02	Collects the necessary information		

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			33.03	Organizes the data in a format suitable for analysis	
	34. Uses effective communication skills		34.01	Speaks clearly and concisely	
			34.02	Uses language and terminology appropriate for the audience	
			34.03	Develops attitudes that facilitate verbal communications	
			34.04	Identifies the reasons for communication breakdowns	
			34.05	Provides appropriate feedback	
			34.06	Identifies those instances when written communication is most appropriate	
			34.07	Determines when verbal communications must be put in writing	
			34.08	Writes in a clear, correct and organized manner	
			34.09	Evaluates client concerns and provides appropriate response	
	35. Solicits employee input on business operations		35.01	Be accessible to staff	
			35.02	Conducts regular staff meetings	
			35.03	Outlines methods for employees to provide feedback	
	36. Demonstrates leadership		36.01	Implements the process of team building	
			36.02	Describes the relationship between the leader and the people	
			36.03	Explains the different levels of positive and negative motivation	
			36.04	Practices effective motivational skills	
			36.05	Emphasizes the personal benefits resulting from achieving expectations	
			36.06	Instills the desire to achieve	
	37. Outlines and communicates goal achievement measures		37.01	States short - and long - term goals and objectives clearly	
			37.02	Ensures that the staff are aware of the stated goals and objectives	
			37.03	Determines staff responsibilities in relation to attaining the goals	
			37.04	Outlines the process to be used in reviewing business progress in relation to the established goals and objectives	
			37.05	Identifies critical milestones for attaining goals	
			37.06	Indicates the timing for attaining goals and objectives	
	38. Ensures that staff is updated and informed about the operations of the business		38.01	Keeps staff informed about the operations of the business	
			38.02	Provides opportunities for staff to ask questions	
	39. Obtains appropriate business insurance, licences and permits		39.01	Obtains liability insurance	
			39.02	Obtains construction insurance	
			39.03	Registers with Workers' Compensation Board (WCB)	
	40. Protects the interests of the business		40.01	Ensures that the contract has been understood and agreed to by both parties	
			40.02	States all specifications and steps to be taken clearly	
			40.03	Determines the value of an arbitration clause in the contract	
			40.04	Maintains open lines of communications throughout the project	
			40.05	Documents activities with different projects	
			40.06	Details the steps in seeking a solution to client / contractor problem	
			40.07	Negotiates a fair and mutual settlement	
			40.08	Collects money on time	
B2. Marketing and Sales					
	41. Manages the marketing strategy		41.01	States to employees and subcontractors the corporate strategy and ensures they work to the stated level of performance	

Shaded areas indicate the level (awareness, knowledge or skill) that has been met for the tasks/subtasks.

			41.02	Assesses the extent to which the individuals functioning within the business reflect the desired image				
			41.03	Assesses the extent of the actual business image to ensure it reflects the desired image				
			41.04	Employs business practices that reflect personal and client sensitiveness				
			41.05	Obtains and assesses feedback concerning the image of the business				
	42.	Manages the advertising plan						
			42.01	Oversees development and production of advertising materials to ensure consistency of message				
			42.02	Places advertising in selected media as applicable				
			42.03	Evaluates placement costs in relation to marketing budget				
			42.04	Assesses effectiveness of each media in relation to good leads per dollar spent by tracking the prospects				
			42.05	Removes less effective advertising placements				
	43.	Manages the public relations plan						
			43.01	Arranges for public relations activities for the business				
			43.02	Provides information to media on business products and activities				
	44.	Manages the sales program						
			44.01	Selects and recruits sales personnel to put sales program into effect				
			44.02	Develops sales presentation consistent with market plan				
			44.03	Arranges for training of sales people representing the business				
			44.04	Schedules sales activities				
			44.05	Obtains feedback from sales people relating to market acceptance				
			44.06	Develops and establishes closure procedures and an administrative framework for closing a sale				
			44.07	Ensures that sales staff is informed of production problems				
	45.	Manages the client referral plan						
			45.01	Ensures that the job is done right the first time				
			45.02	Requests acknowledgement of client satisfaction (letter of recommendation)				
			45.03	Sends or provides token of appreciation to customers				
			45.04	Revisits existing clients				
			45.05	Obtains permission to use certain projects for demonstration purposes				
			45.06	Lives up to the business's service policy				
	46.	Qualifies the prospect						
			46.01	Determines if the type of work proposed suits and is of interest to the business				
			46.02	Determines the seriousness and commitment of the customer				
			46.03	Assesses the competition for the project				
			46.04	Evaluates the time frame of the proposed work and ensures that the schedule can accommodate it				
			46.05	Determines the customer's ability to pay				
	47.	Assesses prospect expectations and needs						
			47.01	Develops a questionnaire in advance of sales calls designed to elicit information about client needs and expectations				
			47.02	Arranges the time and place for a meeting				
			47.03	Develops a method to obtain answers to questionnaire				
			47.04	Listens to and records customer input				
	48.	Develops sales and / or exit strategies						
			48.01	Assesses client				
			48.02	Prepares sales presentation				
			48.03	Uses effective closing techniques				
	49.	Obtains client commitment / contract						

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				49.01	Presents a proposal of work to be performed		
				49.02	Discusses details of the proposal with customer		
				49.03	Overcomes objectives that customers might have		
				49.04	Closes the deal and puts in place the mechanism to obtain signed contract		
				49.05	Accepts deposit		
B3.	Financial Management						
	50.	Establishes and maintains an accounting system that can be easily related to industry projects					
				50.01	Chooses an accountant who is familiar with the industry		
				50.02	Establishes accounting procedures which provide information for each project		
				50.03	Establishes accounting procedures which distinguish between fixed and variable overhead costs		
				50.04	Establishes accounting procedures which allow for regular and ongoing review		
				50.05	Explains the basic accounting principles associated with accounts receivable and payable		
				50.06	Maintains the appropriate documentation for accounts receivable and payable		
				50.07	Maintains a system that compares accounts receivable to accounts payable and cash flow		
				50.08	Establishes and maintains collection procedures for accounts receivable		
				50.09	Develops a system to ensure that accounts are paid within the terms outlined in credit agreements		
	51.	Interprets financial statements and reports					
				51.01	Identifies the source of financial statements within the business		
				51.02	Interprets the contents of the balance sheet		
				51.03	Explains the different components of a balance sheet		
				51.04	Explains the concepts of assets and liabilities		
				51.05	Interprets profit and loss statements		
				51.06	Reads and interprets earned surplus or retained earnings statement		
				51.07	Explains some of the basic ratios associated with interpreting financial statement, such as working capital ratio and interest coverage ratio		
	52.	Establishes required financing					
				52.01	Identifies the services and lending limits of banks, mortgage companies, mortgage brokers, credit unions and trust companies		
				52.02	Establishes an effective working relationship with account managers by keeping them informed of progress on specific projects and business in general		
	53.	Negotiates payment terms with suppliers, subcontractors and developers					
				53.01	Determines normal credit arrangements		
				53.02	Negotiates new credit arrangements		
	54.	Sets up and uses a system to control costs at all levels of the business operations					
				54.01	Implements a system for material purchases		
				54.02	Develops a system for field verification of materials and labour bills		
				54.03	Establishes and works within an approved budget		
	55.	Sets up system to control cash flow					

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			55.01	Explains the purpose of a cash flow system	
			55.02	Predicts job costs and identifies points in time where cash resources will be required	
			55.03	Monitors and updates cash flow projections on a regular basis	
			55.04	Establishes lines of credit with different financial institutions	
		56.		Establishes and maintains a system for project cost control	
			56.01	Explains the concept of project cost control	
			56.02	Maintains accurate project costing records, including labour, materials, subcontractors, etc.	
			56.03	Compares actual project costs to budget figures	
			56.04	Makes necessary adjustments to future job estimates as required	
			56.05	Implements a purchase order system or puts in place alternatives to verify that supplier and subcontractor invoices correspond to goods and services	
			56.06	Maintains control over expenditures and productivity on the job site	
		57.		Establishes effective purchasing practices	
			57.01	Develops a needs list by category and alternatives	
			57.02	Investigates all sources of supply	
			57.03	Requests quotations and terms	
			57.04	Compares quotes	
			57.05	Reviews previous pricing	
			57.06	Makes buying decision	
			57.07	Documents purchases (issues P.O.'s)	
		B4. Human Resource Management			
		58.		Determines salary, benefits and incentive packages	
			58.01	Determines base salary rates for each job function - commensurates with duties and responsibilities performed	
			58.02	Determines benefits package to be provided	
			58.03	Holds regular reviews and performance ratings and adjusts salary accordingly	
			58.04	Offers additional bonus and incentive package such as a profit sharing plan	
		59.		Adopts effective recruiting practices	
			59.01	Evaluates the skill level required for a given job	
			59.02	Fills vacant positions	
			59.03	Explains the salary and compensation package to employees	
			59.04	Describes the remittance requirements	
			59.05	Abides by legislation governing employees in the workplace	
			59.06	Abides by the terms of collective agreements as applicable	
		60.		Recognizes the strengths and limitations of employees and assigns them work accordingly	
			60.01	Assesses employee skills and knowledge	
			60.02	Assigns work that challenges employees to do their best	
		61.		Provides clear instructions when assigning tasks	
			61.01	Defines the tasks to be performed clearly	
			61.02	Sets up a time schedule	
			61.03	Delegates a task	
		62.		Prepares evaluation criteria for employee performance	
			62.01	Develops rating system for scoring	
			62.02	Sets time periods for evaluations	
			62.03	Explains requirements to employees	

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63.	Provides skills development and educational upgrading for all employees	62.04	Ties remuneration increase to a promotion as a reward						
		63.01	Identifies career path opportunities for employees						
		63.02	Provides training for new employees or employees being phased into new jobs, ensuring that their performance meet the requirements						
		63.03	Identifies the role of training in phasing employees into positions of increasing responsibility						
		63.04	Determines skills upgrading requirements						
		63.05	Provides skills development and educational upgrading as a means of improving productivity and profitability						
		63.06	Establishes and maintains a skills development schedule						
		63.07	Allows employees to understand the operation and functions of the various parts of the business						
		63.08	Identifies appropriate skills development vehicles and knowledge upgrading programs						
		63.09	Encourages and makes arrangements for staff and self-attendance at courses and seminars						
		63.10	Evaluates benefits resulting from sending employees to upgrading programs						
B5. Project Management									
		64.	Ensures construction conforms to current codes and standards						
		64.01	Acquires the latest version of the Building Code						
		64.02	Attends code related training programs						
		64.03	Ensures all plans and specifications comply with codes						
		64.04	Ensures field staff are knowledgeable of codes and standards						
		65.	Keeps up-to-date with new products and building processes						
		65.01	Acquires information on products at shows						
		65.02	Subscribes to product and building magazines						
		65.03	Attends conference and meetings						
		65.04	Evaluates new products and discusses their application with suppliers and installers						
		66.	Demonstrates how building components work together as a system						
		66.01	Inspects building thoroughly						
		66.02	Identifies the different components of a building						
		66.03	Assesses the impact of renovation activity on the system						
		67.	Develops solutions to problems which result from building activities						
		67.01	Defines and exposes the problem						
		67.02	Develops and decides on the best possible solution						
		67.03	Maintains a rational perspective						
		68.	Performs thorough site investigation, checks on zoning and ensures all required permits are in place						
		68.01	Investigates site for irregularities						
		68.02	Ensures all construction related permits are in place						
		69.	Perform thorough house inspections						
		69.01	Inspects existing house systems						
		69.02	Investigates the parts of the house that will be affected by the proposed renovation						
		70.	Prepares designs, plans and specifications						
		70.01	Represents the design in plans and specifications						

			70.02	Reviews plans and specifications with the customer for approval prior to construction		
	71.	Estimates accurately all costs of the project				
			71.01	Employs a standard format for estimating project costs, ensuring that the format is detailed		
			71.02	Checks estimate to ensure that all hard and soft costs have been accounted for		
			71.03	Updates base costs on an ongoing basis		
			71.04	Provides cash allowances if and when specifications have not been adequately detailed or chosen by the home owner		
			71.05	Allows for a contingency as a means of protecting profit margin		
	72.	Prepares clear documentation for the bidding and tendering process				
			72.01	Prepares bid packages		
			72.02	Provides bid instructions for subcontractors and suppliers		
			72.03	Prepares clear and accurate documents for tenders		
	73.	Complies with contractual requirements				
			73.01	Identifies the major legal requirements of a contract		
			73.02	Identifies the difference between a verbal, a written contract and an interim contract		
			73.03	Ensures that all pages of a contract, plans and specifications are signed and initialed		
			73.04	Identifies addenda to contracts		
			73.05	Identifies those circumstances when it would be appropriate to use a lawyer		
			73.06	Utilizes the appropriate contract for a variety of conditions		
			73.07	Complies with standard clauses of a sales contract		
	74.	Prepares clear documentation to ensure an effective bidding and tendering process for subcontractors and suppliers				
			74.01	Prepares tender packages		
			74.02	Provides bid instructions for subcontractors and suppliers		
	75.	Prepares contracts to hire subcontractors and suppliers				
			75.01	Ensures contracts reflect terms for supply of goods and / or services to be supplied to site		
			75.02	Includes terms of payment for supply of materials and / or labour		
			75.03	Describes penalties for non-performance		
	76.	Plans and schedules the project				
			76.01	Describes the principles of project scheduling		
			76.02	Identifies the steps required to define and complete a job		
			76.03	Schedules project activities with project financing		
			76.04	Ensures materials can be obtained at the required time		
			76.05	Ensures work is scheduled to allow for inspections to be completed prior to the commencing of the next phase		
			76.06	Develops reporting mechanisms to determine project progress in accordance with plan		
	77.	Arranges contingency plans to deal with potential problems				
			77.01	Describes the resources available to solve problems that arise during construction		
			77.02	Maintains contingency time in the schedule for problem resolution		
	78.	Establishes and maintains an effective working relationship with the clients				
			78.01	Outlines clearly the business's policies and procedures		

			78.02	Explains to your customers the extent and limitations of your business's warranty program			
			78.03	Explains product features and responds to questions			
			78.04	Ensures clients are kept informed of the work in progress			
			78.05	Sets up regular job site meetings to ensure ongoing communication			
			78.06	Trains staff and subcontractors if need arises			
		79.		Addresses and resolves client problems an concerns			
			79.01	Maintains open lines of communication			
			79.02	Shows empathy for client concerns and responds quickly			
			79.03	Responds to clients concerns and complains honestly and diplomatically			
			79.04	Corrects the problem immediately whenever possible			
		80.		Provides after-sales service			
			80.01	Confirms and documents the business's service policy			
			80.02	Thanks client at job completion			
			80.03	Provides customer with warranty certificate			
			80.04	Responds to problems graciously and promptly			
B6.	Project Supervision						
		81.		Checks plans for errors and omissions			
			81.01	Reviews plans and specifications for irregularities or incompleteness			
			81.02	Implements necessary corrections			
		82.		Explains plans and schedules to all site personnel and to the client			
			82.01	Informs all site personnel of the construction schedule			
			82.02	Describes the construction schedule to the client			
		83.		Arranges for and acquires all required materials and labour			
			83.01	Places orders with suppliers and subtrades			
			83.02	Hires required field employees			
		84.		Performs site inspections to monitor job progress and compliance with plans and specifications			
			84.01	Arranges for mandatory inspections as required			
			84.02	Ensures regular staff inspections are conducted as required			
			84.03	Informs staff when inspections will be conducted			
		85.		Supervises activities on the site to make certain they are being performed to business standards			
			85.01	Practices good supervisory skills			
			85.02	Informs trades when slippage is occurring on a project schedule so that they can reschedule other work during the interim			
			85.03	Maintains effective communication links between all site personnel and trades			
			85.04	Demonstrates sensitivity to workers' morale and general concerns			
			85.05	Completes all paperwork associated with work on site			
			85.06	Completes all change orders for a contract			
			85.07	Ensures work site is kept neat, tidy and safe			
			85.08	Ensures work being performed by the subtrades is technically competent and recognizes when standard work is being done			
			85.09	Ensures level of quality is in line with business policy at all stages of production			
		86.		Implements procedures for controlling site activity			
			86.01	Educates employees on business policy			
			86.02	Reinforces and re-evaluates policy continually			

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			86.03	Makes decisions based on business policy		
			86.04	Provides rationale for policies		
			86.05	Uses purchase order systems		
			86.06	Maintains labour and subtrade reports (scheduling and financial)		
			86.07	Monitors progress and compares to original schedule		
			86.08	Tracks materials not being used		
		87.		Enforces safe working conditions		
			87.01	Complies with the requirements of Workplace Hazardous Material Information System (WHMIS)		
			87.02	Complies with the requirements of the Occupational Health and Safety Act		
		88.		Participates in project cost control		
			88.01	Implements cost control procedures		
			88.02	Ensures accurate records are maintained		
B7.	Client Relations					
		89.		Educates customers		
			89.01	Outlines clearly the business's policies and procedures		
			89.02	Explains to customers extent and limitations of business's warranty program		
			89.03	Includes clients in initial and ongoing inspections		
			89.04	Explains product features and responds to questions		
			89.05	Prepares clients for a temporary lifestyle change and inconveniences resulting from extensive renovation		
			89.06	Explains job flow procedures and reason for "dead days" (no worker on site)		
		90.		Addresses issue of client accountability		
			90.01	Confirms mutual responsibilities during the job		
			90.02	Initiates an after-sales service program for product / services		
C1.	Monitoring and Evaluation of Objectives					
		91.		Evaluates whether personal goals are being achieved		
			91.01	Identifies which personal goals are of the greatest importance		
			91.02	Gathers business performance information related to associated business goals		
			91.03	Assesses degree to which goals are being met		
		92.		Assesses whether a business objectives are being met		
			92.01	Gathers relevant information regarding stated business goals		
			92.02	Compares estimated performance with actual performance		
		93.		Determines if services being offered are appropriate		
			93.01	Assesses where income is being generated		
			93.02	Identifies specific services offered by business to customers		
			93.03	Compares income generation to services offered		
		94.		Assesses the approach to business		
			94.01	Determines if time spent by one's self is reasonable and useful		
			94.02	Considers alternative staffing arrangements		
			94.03	Assesses one's self in relation to business growth and advancement		
C2.	Monitoring and Evaluation of Marketing and Sales Plans					
		95.		Determines why prospects came to the business		
			95.01	Develops procedures for tracking prospects		
			95.02	Records responses in a prescribed standard format		
			95.03	Assesses survey results and matches findings to marketing initiatives		

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96.	Determines why prospects purchased or did not purchase the product	96.01	Conducts ongoing evaluation with prospects and customers regarding the purchase decision			
		96.02	Identifies problems with unpopular products			
93.	Reviews market situations / realities	97.01	Prepares detailed project reports covering a one-to-two year period			
		97.02	Determines total sales in the marketplace with total projects sold by the business			
		97.03	Compares sales volume with historical records on a month-to-month basis and by category			
		97.04	Determines actual selling prices throughout the marketplace			
		97.05	Develops criteria to compare similar jobs			
		97.06	Reviews economic indicators on interest rates, job creation and market expansions / contractions			
98.	Compares monthly sales volume with projected sales volume and determines reasons for variances					
		98.01	Gathers accurate monthly sales reports			
		98.02	Compares actual sales to estimated sales			
99.	Determines sales coming from target market					
		99.01	Prepares customer profiles for each product sold			
		99.02	Establishes ratio of estimates to sales			
		99.03	Develops a category analysis (breakdown by job category)			
		99.04	Confirms the profile of the planned target market			
100.	Determines sales resulting from client referral plan					
		100.01	Determines how customers came to your business			
		100.02	Identifies customers referred to business by other customers			
101.	Determines whether business is positioned as planned					
		101.01	Collects information from prospects and customers on their perception of the business			
		101.02	Gathers information from trades, staff and professionals regarding their perception of the business			
C3. Monitoring and Evaluation of the Financial Plan						
		102.	Reviews financial reports			
		102.01	Reviews and assesses monthly statements			
		102.02	Ensures that the financial reports are accurate and reflect the true situation (i.e., accrual basis)			
		102.03	Evaluates business performance			
103.	Compares financial reports against budget expectations					
		103.01	Gets current (actual), timely data			
		103.02	Compares the actual financial report to the original budget for variances			
		103.03	Analyzes variances			
		103.04	Develops and executes an action plan			
104.	Prepares final report on each project					
		104.01	Sets up a system to track job costs			
		104.02	Documents the cost estimate for a project and compares it to the actual cost upon completion			
		104.03	Calculates business's profit or loss on a project as a percentage			
		104.04	Determines ways to reduce variances in future projects			
105.	Compares actual margins with expected margins					

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			105.01	Monitors job cost control system on a continual basis		
			105.02	Reviews monthly financial statements		
			105.03	Reviews cost reports on each project		
	106.	Evaluates requirements for cash flow and capital				
			106.01	Monitors payables versus receivables		
			106.02	Establishes cash flow requirements		
			106.03	Satisfies cash flow requirements		
			106.04	Compares actual capital requirements to original estimate		
C4.	Monitoring and Evaluation of the Operating Plan					
	107.	Monitors operating performance indicators				
			107.01	Collects information on employee performance and production efficiencies		
			107.02	Collects information on sales and financial indicators		
	108.	Monitors type and frequency of customer complaints				
			108.01	Develops a centralized record system for logging complaints by job and by stage of work		
			108.02	Develops a system for reporting complaints received, action taken and results achieved on a regular basis		
			108.03	Assesses ability of the business to respond to customer complaints		
	109.	Monitors the effectiveness of problem solving				
			109.01	Assesses number of problems identified in the business from all areas		
			109.02	Assesses the number of complaints directed at the quality of work performed		
			109.03	Analyzes complaints to identify causes of most common complaints		
			109.04	Determines if response and solution to problems are acceptable		
	110.	Develops options for improving business performance				
			110.01	Assesses the business's performance in relation to goals and objectives		
			110.02	Determines those areas which are in need of improvement		
			110.03	Consults with staff to explore options to improve business performance		
			110.04	Lists the options which are available for improving business performance		
	111.	Assesses options and modifies plans				
			111.01	Assesses existing business plan in relation to its suitability for the next business cycle		
			111.02	Assesses options for modifying plans		
			111.03	Revises or modifies existing business plan or prepares new business plan		
	112.	Revises procedures				
			112.01	Implements new procedures consistent with the revised plan		
			112.02	Communicates new systems and procedures with employees and subcontractors		
			112.03	Monitors implementation of the new procedures		
C5.	Monitoring and Evaluation of Human Resources					
			113.	Assesses performance of employees		
			113.01	Evaluates productivity of employees in performing their job		
			113.02	Evaluates how employees work with their peers		

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			113.03	Evaluates employees' performance in relation to the client and trades		
			113.04	Conducts performance review meeting with the employees		
	114. Compares staff salaries with industry / market standards		114.01	Determines industry standards for salaries for various job categories		
			114.02	Determines the comparable salary to pay when including benefits package		
			114.03	Compares the value of the work performed by the employees in relation to industry standards		
	115. Determines effectiveness of training initiatives		115.01	Identifies training activities conducted		
			115.02	Describes expected results from training		
			115.03	Determines employees perspective on training initiatives		
			115.04	Identifies additional training requirements		

SUB-BLOCK	TASK	SUBTASK	Awareness	Knowledge	Skill
A1. Definition of Business Goals					
	1. Establish personal goals				
		1.01 Clarifies the reasons for starting or continuing business			
		1.02 Defines what is to be accomplished			
		1.03 Defines and records achievable and measurable goals for the short and long term			
		1.04 Determines the opportunity costs of investing your money elsewhere			
		1.05 Determines if you are prepared to make the necessary personal sacrifice			
	2. Establishes business goals				
		2.01 Assesses the changing trends and approaches affecting the residential industry			
		2.02 Establishes short - and long - term objectives			
		2.03 Applies personal goals to business goals			
		2.04 Determines financial goals			
		2.05 Determines the desired business image			
		2.06 Develops a business mission statement			
	3. Determines scope of services				
		3.01 Determines type of services being offered in the marketplace			
		3.02 Determines which services are required for the business to reach its objectives			
	4. Determines business approach				
		4.01 Determines the expected size of the business			
		4.02 Determines the form / structure of the business			
		4.03 Determines elements of business operations to be performed in-house and those which will be subcontracted			
		4.04 Determines what tasks to do personally			
A2. Development of Marketing and Sales Plans					
	5. Determines the general market environment				
		5.01 Assesses the market conditions			
		5.02 Identifies market opportunities			
	6. Determines the target market				
		6.01 Determines the needs and wants of the market			
		6.02 Defines which group of purchasers would be interested in the product			
		6.03 Clearly defines which purchaser groups you want to have an interest in your product			
		6.04 Defines the type of people in the industry one wants to work with			
	7. Determines where the business should be positioned				
		7.01 Determines the manner in which the business provides greater value than that of competitors			
		7.02 Decides how target group prospects should perceive your business / product and compare it to others			
		7.03 Gathers feedback from the target group concerning the business position			
	8. Develops a pricing strategy				
		8.01 Determines projected cost of products including mark-up			
		8.02 Determines market prices for comparable products			
		8.03 Establishes asking price for products, based on business positioning, marketing strategy and margin requirements			

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9.	Develops an original strategy for the marketing activities	9.01	Decides on the message that you want to convey to the target audience	
		9.02	Identifies techniques to effectively communicate the message to the target market	
		9.03	Creates a unique marketing image that makes your product and business stand out from all others	
10.	Develops a sales strategy for the business			
		10.01	Develops the basic tasks associated with selling	
		10.02	Identifies the advantages and disadvantages between selling yourself, using your staff and using an agent	
		10.03	Determines at what point of the year you will sell your products	
		10.04	Determines the effect upon sales of site presentation and business	
11.	Develops a public relations plan			
		11.01	Demonstrates the importance of public relations	
		11.02	Determines public relations options best suited to your marketing strategy and business positioning	
		11.03	Prepares a public relations plan	
		11.04	Develops a budget for public relations activities	
12.	Determines the marketing tools to be used			
		12.01	Decides on the kind of methods one will use to reach the target groups with the message about the product and business	
		12.02	Determines the amount of money to be allocated to marketing	
		12.03	Determines when each method will be employed and over what time period	
		12.04	Determines the optimum marketing tool for the product / business using cost effectiveness data	
13.	Develops an advertising plan			
		13.01	Assesses objectives	
		13.02	Allocates budget	
		13.03	Develops a monthly advertising plan	
		13.04	Evaluates and selects medium	
		13.05	Develops advertising materials consistent with marketing strategy	
		13.06	Develops copy - for letterhead, business cards, advertising, signage and other promotional vehicles - consistent with the corporate image	
		13.07	Selects the market areas and media for placement of advertising	
		13.08	Establishes a purchasing plan	
		13.09	Obtains co-operation and financial support from suppliers	
		13.10	Develops a procedure for tracking results	
14.	Develops a client referral plan			
		14.01	Determines how previous clients can assist in marketing the business	
		14.02	Identifies alternative means of communicating client satisfaction in the business 's product and / or service to the target market	
		14.03	Communicates the client referral plan to the staff, subcontractors and prospective clients	
A3.	Development of a Financial Plan			
15.	Prepares pro forma income statements			
		15.01	Projects expected gross revenue from sales of the products and services	
		15.02	Determines the cost of producing the product or providing the service	
		15.03	Estimates the cost of operating the business	

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			15.04	Determines the expected net income		
			15.05	Determines the risk involved in working to the projected level		
	16.	Develops pro forma balance sheet				
			16.01	Identifies all assets of the business		
			16.02	Identifies all liabilities of the business		
			16.03	Determines the shareholder's equity and retained earnings		
	17.	Prepares cash flow estimates				
			17.01	Determines the timing and amount of payments for goods, services and office operations		
			17.02	Estimates timing of income to be received		
			17.03	Determines the amount of bridge (temporary) financing required to satisfy the expected payment schedule		
	18.	Develops a long-term financial plan				
			18.01	Estimates future sales possibilities		
			18.02	Determines requirement for capital and establishes plan for acquisition		
			18.03	Assesses the effects of recessions, booms and normal industry cycles		
			18.04	Estimates return on investment		
	19.	Determines required mark-ups				
			19.01	Determines projected cost of production		
			19.02	Determines projected cost of operating the business		
			19.03	Determines projected business profit		
			19.04	Determines required mark-up of production costs to cover operating costs and desired profit		
			19.05	Alters mark-up based on market conditions		
A4.	Development of an Operating Plan					
	20.	Develops a code of ethics to cover all business operations				
			20.01	Recognizes the importance of ethical standards in relation to long-term reputation		
			20.02	Determines ethical standard for working with employees, subcontractors, prospects and clients		
	21.	Develops a land / property acquisition plan				
			21.01	Determines type of land / property required to support your market position		
			21.02	Determines availability of suitable land / property		
	22.	Develops a design and drafting plan				
			22.01	Determines design and drafting requirements		
			22.02	Assesses computerized design and drafting options		
	23.	Develops an estimating plan				
			23.01	Determines cost estimating methods		
			23.02	Determines a procedure for gathering bids from trades and suppliers		
	24.	Develops a contract administration plan				
			24.01	Establishes change order procedures		
			24.02	Develops a contract package		
			24.03	Explains the major legal requirements of a contract		
			24.04	Explains the difference between a verbal, a written contract and an interim contract		
			24.05	Signs and initials all pages of a contract, plans and specifications		
	25.	Develops a quality control plan				
			25.01	Establishes quality standards for the business		
			25.02	Develops inspection procedures		
	26.	Develops a customer service program				
			26.01	Establishes a philosophy for customer service		

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			26.02	Develops customer service policies			
			26.03	Establishes a level of customer service			
	27.	Develops a waste management plan	27.01	Reviews waste stream being generated from construction activities			
			27.02	Determines where wastes can be reduced within the project			
			27.03	Determines which materials can be sent to recycling centres			
A5.	Development of a Human Resource Plan						
	28.	Determines the human resource needs	28.01	Arranges groups of tasks into job functions			
			28.02	Determines whether work is to be performed by in-house staff or by trade or professional subcontractors			
			28.03	Determines desired staffing complement			
			28.04	Identifies skills required of the key personnel			
			28.05	Plans the long-term approach to skills upgrading			
			28.06	Determines priorities to be used when establishing relationships with company employees, such as: profitability, quality control, business approach and ethics			
	29.	Prepares job descriptions for all employees					
			29.01	Assigns job functions to employees			
			29.02	Determines responsibilities and authority for each job			
	30.	Prepares plans to ensure the business has sufficient skilled human resources					
			30.01	Determines which skills should ideally be provided by employees of the business			
			30.02	Determines the training required to provide the needed skills and knowledge to the owner			
			30.03	Assesses the skills and knowledge that are available through the use of contract labour			
			30.04	Determines how human resources will be acquired			
B1.	Business Management						
	31.	Organizes and equips the business office					
			31.01	Develops an organizational chart			
			31.02	Develops internal office systems			
			31.03	Determines equipment and supplies required			
			31.04	Capitalizes on office equipment and product features to enhance efficiency			
			31.05	Recognizes the type of work for which a computer is most suited in the industry			
			31.06	Decides whether the operation would benefit from the use of a computer			
			31.07	Determines how a computer would be introduced into the business operation			
	32.	Develops clear instructions relating to job functions and tasks being delegated					
			32.01	Defines the task clearly - both what is to be done and why			
			32.02	Determines whether the individual can adequately perform the task			
			32.03	Defines clearly the level and limits of authority delegated			
			32.04	Provides assistance, as required to ensure that the task will be satisfactorily completed			
			32.05	Ensures that problems are clearly communicated			
	33.	Assesses value of information required to manage business					
			33.01	Decides when, and what, information is required in order to manage the operations of the business			
			33.02	Collects the necessary information			

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34.	Uses effective communication skills	33.03	Organizes the data in a format suitable for analysis					
		34.01	Speaks clearly and concisely					
		34.02	Uses language and terminology appropriate for the audience					
		34.03	Develops attitudes that facilitate verbal communications					
		34.04	Identifies the reasons for communication breakdowns					
		34.05	Provides appropriate feedback					
		34.06	Identifies those instances when written communication is most appropriate					
		34.07	Determines when verbal communications must be put in writing					
		34.08	Writes in a clear, correct and organized manner					
		34.09	Evaluates client concerns and provides appropriate response					
35.	Solicits employee input on business operations							
		35.01	Be accessible to staff					
		35.02	Conducts regular staff meetings					
36.	Demonstrates leadership	35.03	Outlines methods for employees to provide feedback					
		36.01	Implements the process of team building					
		36.02	Describes the relationship between the leader and the people					
		36.03	Explains the different levels of positive and negative motivation					
		36.04	Practices effective motivational skills					
		36.05	Emphasizes the personal benefits resulting from achieving expectations					
		36.06	Instills the desire to achieve					
37.	Outlines and communicates goal achievement measures							
		37.01	States short - and long - term goals and objectives clearly					
		37.02	Ensures that the staff are aware of the stated goals and objectives					
		37.03	Determines staff responsibilities in relation to attaining the goals					
		37.04	Outlines the process to be used in reviewing business progress in relation to the established goals and objectives					
		37.05	Identifies critical milestones for attaining goals					
		37.06	Indicates the timing for attaining goals and objectives					
38.	Ensures that staff is updated and informed about the operations of the business							
		38.01	Keeps staff informed about the operations of the business					
		38.02	Provides opportunities for staff to ask questions					
39.	Obtains appropriate business insurance, licences and permits							
		39.01	Obtains liability insurance					
		39.02	Obtains construction insurance					
		39.03	Registers with Workers' Compensation Board (WCB)					
40.	Protects the interests of the business							
		40.01	Ensures that the contract has been understood and agreed to by both parties					
		40.02	States all specifications and steps to be taken clearly					
		40.03	Determines the value of an arbitration clause in the contract					
		40.04	Maintains open lines of communications throughout the project					
		40.05	Documents activities with different projects					
		40.06	Details the steps in seeking a solution to client / contractor problem					
		40.07	Negotiates a fair and mutual settlement					
		40.08	Collects money on time					
B2.	Marketing and Sales							
		41.	Manages the marketing strategy					
		41.01	States to employees and subcontractors the corporate strategy and ensures they work to the stated level of performance					

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			41.02	Assesses the extent to which the individuals functioning within the business reflect the desired image		
			41.03	Assesses the extent of the actual business image to ensure it reflects the desired image		
			41.04	Employs business practices that reflect personal and client sensitiveness		
			41.05	Obtains and assesses feedback concerning the image of the business		
	42.	Manages the advertising plan	42.01	Oversees development and production of advertising materials to ensure consistency of message		
			42.02	Places advertising in selected media as applicable		
			42.03	Evaluates placement costs in relation to marketing budget		
			42.04	Assesses effectiveness of each media in relation to good leads per dollar spent by tracking the prospects		
			42.05	Removes less effective advertising placements		
	43.	Manages the public relations plan	43.01	Arranges for public relations activities for the business		
			43.02	Provides information to media on business products and activities		
	44.	Manages the sales program	44.01	Selects and recruits sales personnel to put sales program into effect		
			44.02	Develops sales presentation consistent with market plan		
			44.03	Arranges for training of sales people representing the business		
			44.04	Schedules sales activities		
			44.05	Obtains feedback from sales people relating to market acceptance		
			44.06	Develops and establishes closure procedures and an administrative framework for closing a sale		
			44.07	Ensures that sales staff is informed of production problems		
	45.	Manages the client referral plan	45.01	Ensures that the job is done right the first time		
			45.02	Requests acknowledgement of client satisfaction (letter of recommendation)		
			45.03	Sends or provides token of appreciation to customers		
			45.04	Revisits existing clients		
			45.05	Obtains permission to use certain projects for demonstration purposes		
			45.06	Lives up to the business's service policy		
	46.	Qualifies the prospect	46.01	Determines if the type of work proposed suits and is of interest to the business		
			46.02	Determines the seriousness and commitment of the customer		
			46.03	Assesses the competition for the project		
			46.04	Evaluates the time frame of the proposed work and ensures that the schedule can accommodate it		
			46.05	Determines the customer's ability to pay		
	47.	Assesses prospect expectations and needs	47.01	Develops a questionnaire in advance of sales calls designed to elicit information about client needs and expectations		
			47.02	Arranges the time and place for a meeting		
			47.03	Develops a method to obtain answers to questionnaire		
			47.04	Listens to and records customer input		
	48.	Develops sales and / or exit strategies	48.01	Assesses client		
			48.02	Prepares sales presentation		
			48.03	Uses effective closing techniques		
	49.	Obtains client commitment / contract				

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						49.01 Presents a proposal of work to be performed			
						49.02 Discusses details of the proposal with customer			
						49.03 Overcomes objectives that customers might have			
						49.04 Closes the deal and puts in place the mechanism to obtain signed contract			
						49.05 Accepts deposit			
B3. Financial Management									
	50. Establishes and maintains an accounting system that can be easily related to industry projects								
						50.01 Chooses an accountant who is familiar with the industry			
						50.02 Establishes accounting procedures which provide information for each project			
						50.03 Establishes accounting procedures which distinguish between fixed and variable overhead costs			
						50.04 Establishes accounting procedures which allow for regular and ongoing review			
						50.05 Explains the basic accounting principles associated with accounts receivable and payable			
						50.06 Maintains the appropriate documentation for accounts receivable and payable			
						50.07 Maintains a system that compares accounts receivable to accounts payable and cash flow			
						50.08 Establishes and maintains collection procedures for accounts receivable			
						50.09 Develops a system to ensure that accounts are paid within the terms outlined in credit agreements			
					51. Interprets financial statements and reports				
						51.01 Identifies the source of financial statements within the business			
						51.02 Interprets the contents of the balance sheet			
						51.03 Explains the different components of a balance sheet			
						51.04 Explains the concepts of assets and liabilities			
						51.05 Interprets profit and loss statements			
						51.06 Reads and interprets earned surplus or retained earnings statement			
						51.07 Explains some of the basic ratios associated with interpreting financial statement, such as working capital ratio and interest coverage ratio			
	52. Establishes required financing								
						52.01 Identifies the services and lending limits of banks, mortgage companies, mortgage brokers, credit unions and trust companies			
						52.02 Establishes an effective working relationship with account managers by keeping them informed of progress on specific projects and business in general			
	53. Negotiates payment terms with suppliers, subcontractors and developers								
						53.01 Determines normal credit arrangements			
						53.02 Negotiates new credit arrangements			
	54. Sets up and uses a system to control costs at all levels of the business operations								
						54.01 Implements a system for material purchases			
						54.02 Develops a system for field verification of materials and labour bills			
						54.03 Establishes and works within an approved budget			
	55. Sets up system to control cash flow								

			55.01	Explains the purpose of a cash flow system			
			55.02	Predicts job costs and identifies points in time where cash resources will be required			
			55.03	Monitors and updates cash flow projections on a regular basis			
			55.04	Establishes lines of credit with different financial institutions			
	56.	Establishes and maintains a system for project cost control					
			56.01	Explains the concept of project cost control			
			56.02	Maintains accurate project costing records, including labour, materials, subcontractors, etc.			
			56.03	Compares actual project costs to budget figures			
			56.04	Makes necessary adjustments to future job estimates as required			
			56.05	Implements a purchase order system or puts in place alternatives to verify that supplier and subcontractor invoices correspond to goods and services			
			56.06	Maintains control over expenditures and productivity on the job site			
	57.	Establishes effective purchasing practices					
			57.01	Develops a needs list by category and alternatives			
			57.02	Investigates all sources of supply			
			57.03	Requests quotations and terms			
			57.04	Compares quotes			
			57.05	Reviews previous pricing			
			57.06	Makes buying decision			
			57.07	Documents purchases (issues P.O.'s)			
B4.	Human Resource Management						
	58.	Determines salary, benefits and incentive packages					
			58.01	Determines base salary rates for each job function - commensurates with duties and responsibilities performed			
			58.02	Determines benefits package to be provided			
			58.03	Holds regular reviews and performance ratings and adjusts salary accordingly			
			58.04	Offers additional bonus and incentive package such as a profit sharing plan			
	59.	Adopts effective recruiting practices					
			59.01	Evaluates the skill level required for a given job			
			59.02	Fills vacant positions			
			59.03	Explains the salary and compensation package to employees			
			59.04	Describes the remittance requirements			
			59.05	Abides by legislation governing employees in the workplace			
			59.06	Abides by the terms of collective agreements as applicable			
	60.	Recognizes the strengths and limitations of employees and assigns them work accordingly					
			60.01	Assesses employee skills and knowledge			
			60.02	Assigns work that challenges employees to do their best			
	61.	Provides clear instructions when assigning tasks					
			61.01	Defines the tasks to be performed clearly			
			61.02	Sets up a time schedule			
			61.03	Delegates a task			
	62.	Prepares evaluation criteria for employee performance					
			62.01	Develops rating system for scoring			
			62.02	Sets time periods for evaluations			
			62.03	Explains requirements to employees			

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63.	Provides skills development and educational upgrading for all employees	62.04	Ties remuneration increase to a promotion as a reward		
		63.01	Identifies career path opportunities for employees		
		63.02	Provides training for new employees or employees being phased into new jobs, ensuring that their performance meet the requirements		
		63.03	Identifies the role of training in phasing employees into positions of increasing responsibility		
		63.04	Determines skills upgrading requirements		
		63.05	Provides skills development and educational upgrading as a means of improving productivity and profitability		
		63.06	Establishes and maintains a skills development schedule		
		63.07	Allows employees to understand the operation and functions of the various parts of the business		
		63.08	Identifies appropriate skills development vehicles and knowledge upgrading programs		
		63.09	Encourages and makes arrangements for staff and self-attendance at courses and seminars		
		63.10	Evaluates benefits resulting from sending employees to upgrading programs		
B5. Project Management					
64.	Ensures construction conforms to current codes and standards				
		64.01	Acquires the latest version of the Building Code		
		64.02	Attends code related training programs		
		64.03	Ensures all plans and specifications comply with codes		
		64.04	Ensures field staff are knowledgeable of codes and standards		
65.	Keeps up-to-date with new products and building processes				
		65.01	Acquires information on products at shows		
		65.02	Subscribes to product and building magazines		
		65.03	Attends conference and meetings		
		65.04	Evaluates new products and discusses their application with suppliers and installers		
66.	Demonstrates how building components work together as a system				
		66.01	Inspects building thoroughly		
		66.02	Identifies the different components of a building		
		66.03	Assesses the impact of renovation activity on the system		
67.	Develops solutions to problems which result from building activities				
		67.01	Defines and exposes the problem		
		67.02	Develops and decides on the best possible solution		
		67.03	Maintains a rational perspective		
68.	Performs thorough site investigation, checks on zoning and ensures all required permits are in place				
		68.01	Investigates site for irregularities		
		68.02	Ensures all construction related permits are in place		
69.	Perform thorough house inspections				
		69.01	Inspects existing house systems		
		69.02	Investigates the parts of the house that will be affected by the proposed renovation		
70.	Prepares designs, plans and specifications				
		70.01	Represents the design in plans and specifications		

			70.02	Reviews plans and specifications with the customer for approval prior to construction			
	71.	Estimates accurately all costs of the project					
			71.01	Employs a standard format for estimating project costs, ensuring that the format is detailed			
			71.02	Checks estimate to ensure that all hard and soft costs have been accounted for			
			71.03	Updates base costs on an ongoing basis			
			71.04	Provides cash allowances if and when specifications have not been adequately detailed or chosen by the home owner			
			71.05	Allows for a contingency as a means of protecting profit margin			
	72.	Prepares clear documentation for the bidding and tendering process					
			72.01	Prepares bid packages			
			72.02	Provides bid instructions for subcontractors and suppliers			
			72.03	Prepares clear and accurate documents for tenders			
	73.	Complies with contractual requirements					
			73.01	Identifies the major legal requirements of a contract			
			73.02	Identifies the difference between a verbal, a written contract and an interim contract			
			73.03	Ensures that all pages of a contract, plans and specifications are signed and initialed			
			73.04	Identifies addenda to contracts			
			73.05	Identifies those circumstances when it would be appropriate to use a lawyer			
			73.06	Utilizes the appropriate contract for a variety of conditions			
			73.07	Complies with standard clauses of a sales contract			
	74.	Prepares clear documentation to ensure an effective bidding and tendering process for subcontractors and suppliers					
			74.01	Prepares tender packages			
			74.02	Provides bid instructions for subcontractors and suppliers			
	75.	Prepares contracts to hire subcontractors and suppliers					
			75.01	Ensures contracts reflect terms for supply of goods and / or services to be supplied to site			
			75.02	Includes terms of payment for supply of materials and / or labour			
			75.03	Describes penalties for non-performance			
	76.	Plans and schedules the project					
			76.01	Describes the principles of project scheduling			
			76.02	Identifies the steps required to define and complete a job			
			76.03	Schedules project activities with project financing			
			76.04	Ensures materials can be obtained at the required time			
			76.05	Ensures work is scheduled to allow for inspections to be completed prior to the commencing of the next phase			
			76.06	Develops reporting mechanisms to determine project progress in accordance with plan			
	77.	Arranges contingency plans to deal with potential problems					
			77.01	Describes the resources available to solve problems that arise during construction			
			77.02	Maintains contingency time in the schedule for problem resolution			
	78.	Establishes and maintains an effective working relationship with the clients					
			78.01	Outlines clearly the business's policies and procedures			

			78.02	Explains to your customers the extent and limitations of your business's warranty program	
			78.03	Explains product features and responds to questions	
			78.04	Ensures clients are kept informed of the work in progress	
			78.05	Sets up regular job site meetings to ensure ongoing communication	
			78.06	Trains staff and subcontractors if need arises	
		79.		Addresses and resolves client problems an concerns	
			79.01	Maintains open lines of communication	
			79.02	Shows empathy for client concerns and responds quickly	
			79.03	Responds to clients concerns and complains honestly and diplomatically	
			79.04	Corrects the problem immediately whenever possible	
		80.		Provides after-sales service	
			80.01	Confirms and documents the business's service policy	
			80.02	Thanks client at job completion	
			80.03	Provides customer with warranty certificate	
			80.04	Responds to problems graciously and promptly	
	B6.	Project Supervision			
			81.	Checks plans for errors and omissions	
			81.01	Reviews plans and specifications for irregularities or incompleteness	
			81.02	Implements necessary corrections	
		82.		Explains plans and schedules to all site personnel and to the client	
			82.01	Informs all site personnel of the construction schedule	
			82.02	Describes the construction schedule to the client	
		83.		Arranges for and acquires all required materials and labour	
			83.01	Places orders with suppliers and subtrades	
			83.02	Hires required field employees	
		84.		Performs site inspections to monitor job progress and compliance with plans and specifications	
			84.01	Arranges for mandatory inspections as required	
			84.02	Ensures regular staff inspections are conducted as required	
			84.03	Informs staff when inspections will be conducted	
		85.		Supervises activities on the site to make certain they are being performed to business standards	
			85.01	Practices good supervisory skills	
			85.02	Informs trades when slippage is occurring on a project schedule so that they can reschedule other work during the interim	
			85.03	Maintains effective communication links between all site personnel and trades	
			85.04	Demonstrates sensitivity to workers' morale and general concerns	
			85.05	Completes all paperwork associated with work on site	
			85.06	Completes all change orders for a contract	
			85.07	Ensures work site is kept neat, tidy and safe	
			85.08	Ensures work being performed by the subtrades is technically competent and recognizes when substandard work is being done	
			85.09	Ensures level of quality is in line with business policy at all stages of production	
		86.		Implements procedures for controlling site activity	
			86.01	Educates employees on business policy	
			86.02	Reinforces and re-evaluates policy continually	

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			86.03	Makes decisions based on business policy		
			86.04	Provides rationale for policies		
			86.05	Uses purchase order systems		
			86.06	Maintains labour and subtrade reports (scheduling and financial)		
			86.07	Monitors progress and compares to original schedule		
			86.08	Tracks materials not being used		
		87.		Enforces safe working conditions		
			87.01	Complies with the requirements of Workplace Hazardous Material Information System (WHMIS)		
			87.02	Complies with the requirements of the Occupational Health and Safety Act		
		88.		Participates in project cost control		
			88.01	Implements cost control procedures		
			88.02	Ensures accurate records are maintained		
B7.	Client Relations					
		89.		Educates customers		
			89.01	Outlines clearly the business's policies and procedures		
			89.02	Explains to customers extent and limitations of business's warranty program		
			89.03	Includes clients in initial and ongoing inspections		
			89.04	Explains product features and responds to questions		
			89.05	Prepares clients for a temporary lifestyle change and inconveniences resulting from extensive renovation		
			89.06	Explains job flow procedures and reason for "dead days" (no worker on site)		
		90.		Addresses issue of client accountability		
			90.01	Confirms mutual responsibilities during the job		
			90.02	Initiates an after-sales service program for product / services		
C1.	Monitoring and Evaluation of Objectives					
		91.		Evaluates whether personal goals are being achieved		
			91.01	Identifies which personal goals are of the greatest importance		
			91.02	Gathers business performance information related to associated business goals		
			91.03	Assesses degree to which goals are being met		
		92.		Assesses whether a business objectives are being met		
			92.01	Gathers relevant information regarding stated business goals		
			92.02	Compares estimated performance with actual performance		
		93.		Determines if services being offered are appropriate		
			93.01	Assesses where income is being generated		
			93.02	Identifies specific services offered by business to customers		
			93.03	Compares income generation to services offered		
		94.		Assesses the approach to business		
			94.01	Determines if time spent by one's self is reasonable and useful		
			94.02	Considers alternative staffing arrangements		
			94.03	Assesses one's self in relation to business growth and advancement		
C2.	Monitoring and Evaluation of Marketing and Sales Plans					
		95.		Determines why prospects came to the business		
			95.01	Develops procedures for tracking prospects		
			95.02	Records responses in a prescribed standard format		
			95.03	Assesses survey results and matches findings to marketing initiatives		

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96.	Determines why prospects purchased or did not purchase the product	96.01	Conducts ongoing evaluation with prospects and customers regarding the purchase decision						
		96.02	Identifies problems with unpopular products						
93.	Reviews market situations / realities	97.01	Prepares detailed project reports covering a one-to-two year period						
		97.02	Determines total sales in the marketplace with total projects sold by the business						
		97.03	Compares sales volume with historical records on a month-to-month basis and by category						
		97.04	Determines actual selling prices throughout the marketplace						
		97.05	Develops criteria to compare similar jobs						
		97.06	Reviews economic indicators on interest rates, job creation and market expansions / contractions						
98.	Compares monthly sales volume with projected sales volume and determines reasons for variances								
		98.01	Gathers accurate monthly sales reports						
99.	Determines sales coming from target market	98.02	Compares actual sales to estimated sales						
		99.01	Prepares customer profiles for each product sold						
		99.02	Establishes ratio of estimates to sales						
		99.03	Develops a category analysis (breakdown by job category)						
		99.04	Confirms the profile of the planned target market						
100.	Determines sales resulting from client referral plan								
		100.01	Determines how customers came to your business						
		100.02	Identifies customers referred to business by other customers						
101.	Determines whether business is positioned as planned								
		101.01	Collects information from prospects and customers on their perception of the business						
		101.02	Gathers information from trades, staff and professionals regarding their perception of the business						
C3. Monitoring and Evaluation of the Financial Plan									
		102.	Reviews financial reports						
		102.01	Reviews and assesses monthly statements						
		102.02	Ensures that the financial reports are accurate and reflect the true situation (i.e., accrual basis)						
		102.03	Evaluates business performance						
103.	Compares financial reports against budget expectations								
		103.01	Gets current (actual), timely data						
		103.02	Compares the actual financial report to the original budget for variances						
		103.03	Analyzes variances						
		103.04	Develops and executes an action plan						
104.	Prepares final report on each project								
		104.01	Sets up a system to track job costs						
		104.02	Documents the cost estimate for a project and compares it to the actual cost upon completion						
		104.03	Calculates business's profit or loss on a project as a percentage						
		104.04	Determines ways to reduce variances in future projects						
105.	Compares actual margins with expected margins								

Shaded areas indicate the level (awareness, knowledge or skill) that has been met for the tasks/subtasks.

			105.01	Monitors job cost control system on a continual basis		
			105.02	Reviews monthly financial statements		
			105.03	Reviews cost reports on each project		
	106.	Evaluates requirements for cash flow and capital				
			106.01	Monitors payables versus receivables		
			106.02	Establishes cash flow requirements		
			106.03	Satisfies cash flow requirements		
			106.04	Compares actual capital requirements to original estimate		
C4.	Monitoring and Evaluation of the Operating Plan					
	107.	Monitors operating performance indicators				
			107.01	Collects information on employee performance and production efficiencies		
			107.02	Collects information on sales and financial indicators		
	108.	Monitors type and frequency of customer complaints				
			108.01	Develops a centralized record system for logging complaints by job and by stage of work		
			108.02	Develops a system for reporting complaints received, action taken and results achieved on a regular basis		
			108.03	Assesses ability of the business to respond to customer complaints		
	109.	Monitors the effectiveness of problem solving				
			109.01	Assesses number of problems identified in the business from all areas		
			109.02	Assesses the number of complaints directed at the quality of work performed		
			109.03	Analyzes complaints to identify causes of most common complaints		
			109.04	Determines if response and solution to problems are acceptable		
	110.	Develops options for improving business performance				
			110.01	Assesses the business's performance in relation to goals and objectives		
			110.02	Determines those areas which are in need of improvement		
			110.03	Consults with staff to explore options to improve business performance		
			110.04	Lists the options which are available for improving business performance		
	111.	Assesses options and modifies plans				
			111.01	Assesses existing business plan in relation to its suitability for the next business cycle		
			111.02	Assesses options for modifying plans		
			111.03	Revises or modifies existing business plan or prepares new business plan		
	112.	Revises procedures				
			112.01	Implements new procedures consistent with the revised plan		
			112.02	Communicates new systems and procedures with employees and subcontractors		
			112.03	Monitors implementation of the new procedures		
C5.	Monitoring and Evaluation of Human Resources					
			113.	Assesses performance of employees		
			113.01	Evaluates productivity of employees in performing their job		
			113.02	Evaluates how employees work with their peers		

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			113.03	Evaluates employees' performance in relation to the client and trades			
			113.04	Conducts performance review meeting with the employees			
	114. Compares staff salaries with industry / market standards		114.01	Determines industry standards for salaries for various job categories			
			114.02	Determines the comparable salary to pay when including benefits package			
			114.03	Compares the value of the work performed by the employees in relation to industry standards			
	115. Determines effectiveness of training initiatives		115.01	Identifies training activities conducted			
			115.02	Describes expected results from training			
			115.03	Determines employees perspective on training initiatives			
			115.04	Identifies additional training requirements			

SUB-BLOCK	TASK	SUBTASK	Awareness	Knowledge	Skill
A1. Definition of Business Goals					
	1. Establish personal goals				
		1.01 Clarifies the reasons for starting or continuing business			
		1.02 Defines what is to be accomplished			
		1.03 Defines and records achievable and measurable goals for the short and long term			
		1.04 Determines the opportunity costs of investing your money elsewhere			
		1.05 Determines if you are prepared to make the necessary personal sacrifice			
	2. Establishes business goals				
		2.01 Assesses the changing trends and approaches affecting the residential industry			
		2.02 Establishes short - and long - term objectives			
		2.03 Applies personal goals to business goals			
		2.04 Determines financial goals			
		2.05 Determines the desired business image			
		2.06 Develops a business mission statement			
	3. Determines scope of services				
		3.01 Determines type of services being offered in the marketplace			
		3.02 Determines which services are required for the business to reach its objectives			
	4. Determines business approach				
		4.01 Determines the expected size of the business			
		4.02 Determines the form / structure of the business			
		4.03 Determines elements of business operations to be performed in-house and those which will be subcontracted			
		4.04 Determines what tasks to do personally			
A2. Development of Marketing and Sales Plans					
	5. Determines the general market environment				
		5.01 Assesses the market conditions			
		5.02 Identifies market opportunities			
	6. Determines the target market				
		6.01 Determines the needs and wants of the market			
		6.02 Defines which group of purchasers would be interested in the product			
		6.03 Clearly defines which purchaser groups you want to have an interest in your product			
		6.04 Defines the type of people in the industry one wants to work with			
	7. Determines where the business should be positioned				
		7.01 Determines the manner in which the business provides greater value than that of competitors			
		7.02 Decides how target group prospects should perceive your business / product and compare it to others			
		7.03 Gathers feedback from the target group concerning the business position			
	8. Develops a pricing strategy				
		8.01 Determines projected cost of products including mark-up			
		8.02 Determines market prices for comparable products			
		8.03 Establishes asking price for products, based on business positioning, marketing strategy and margin requirements			

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9.	Develops an original strategy for the marketing activities			Decides on the message that you want to convey to the target audience			
		9.01		Identifies techniques to effectively communicate the message to the target market			
		9.02		Creates a unique marketing image that makes your product and business stand out from all others			
10.	Develops a sales strategy for the business						
		10.01		Develops the basic tasks associated with selling			
		10.02		Identifies the advantages and disadvantages between selling yourself, using your staff and using an agent			
		10.03		Determines at what point of the year you will sell your products			
		10.04		Determines the effect upon sales of site presentation and business			
11.	Develops a public relations plan						
		11.01		Demonstrates the importance of public relations			
		11.02		Determines public relations options best suited to your marketing strategy and business positioning			
		11.03		Prepares a public relations plan			
		11.04		Develops a budget for public relations activities			
12.	Determines the marketing tools to be used						
		12.01		Decides on the kind of methods one will use to reach the target groups with the message about the product and business			
		12.02		Determines the amount of money to be allocated to marketing			
		12.03		Determines when each method will be employed and over what time period			
		12.04		Determines the optimum marketing tool for the product / business using cost effectiveness data			
13.	Develops an advertising plan						
		13.01		Assesses objectives			
		13.02		Allocates budget			
		13.03		Develops a monthly advertising plan			
		13.04		Evaluates and selects medium			
		13.05		Develops advertising materials consistent with marketing strategy			
		13.06		Develops copy - for letterhead, business cards, advertising, signage and other promotional vehicles - consistent with the corporate image			
		13.07		Selects the market areas and media for placement of advertising			
		13.08		Establishes a purchasing plan			
		13.09		Obtains co-operation and financial support from suppliers			
		13.10		Develops a procedure for tracking results			
14.	Develops a client referral plan						
		14.01		Determines how previous clients can assist in marketing the business			
		14.02		Identifies alternative means of communicating client satisfaction in the business 's product and / or service to the target market			
		14.03		Communicates the client referral plan to the staff, subcontractors and prospective clients			
A3.	Development of a Financial Plan						
15.	Prepares pro forma income statements						
		15.01		Projects expected gross revenue from sales of the products and services			
		15.02		Determines the cost of producing the product or providing the service			
		15.03		Estimates the cost of operating the business			

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	16.	Develops pro forma balance sheet	15.04	Determines the expected net income						
			15.05	Determines the risk involved in working to the projected level						
			16.01	Identifies all assets of the business						
			16.02	Identifies all liabilities of the business						
			16.03	Determines the shareholder's equity and retained earnings						
	17.	Prepares cash flow estimates								
			17.01	Determines the timing and amount of payments for goods, services and office operations						
			17.02	Estimates timing of income to be received						
			17.03	Determines the amount of bridge (temporary) financing required to satisfy the expected payment schedule						
	18.	Develops a long-term financial plan								
			18.01	Estimates future sales possibilities						
			18.02	Determines requirement for capital and establishes plan for acquisition						
			18.03	Assesses the effects of recessions, booms and normal industry cycles						
			18.04	Estimates return on investment						
	19.	Determines required mark-ups								
			19.01	Determines projected cost of production						
			19.02	Determines projected cost of operating the business						
			19.03	Determines projected business profit						
			19.04	Determines required mark-up of production costs to cover operating costs and desired profit						
			19.05	Alters mark-up based on market conditions						
	A4.	Development of an Operating Plan								
	20.	Develops a code of ethics to cover all business operations								
			20.01	Recognizes the importance of ethical standards in relation to long-term reputation						
			20.02	Determines ethical standard for working with employees, subcontractors, prospects and clients						
	21.	Develops a land / property acquisition plan								
			21.01	Determines type of land / property required to support your market position						
			21.02	Determines availability of suitable land / property						
	22.	Develops a design and drafting plan								
			22.01	Determines design and drafting requirements						
			22.02	Assesses computerized design and drafting options						
	23.	Develops an estimating plan								
			23.01	Determines cost estimating methods						
			23.02	Determines a procedure for gathering bids from trades and suppliers						
	24.	Develops a contract administration plan								
			24.01	Establishes change order procedures						
			24.02	Develops a contract package						
			24.03	Explains the major legal requirements of a contract						
			24.04	Explains the difference between a verbal, a written contract and an interim contract						
			24.05	Signs and initials all pages of a contract, plans and specifications						
	25.	Develops a quality control plan								
			25.01	Establishes quality standards for the business						
			25.02	Develops inspection procedures						
	26.	Develops a customer service program								
			26.01	Establishes a philosophy for customer service						

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			26.02	Develops customer service policies		
			26.03	Establishes a level of customer service		
	27.	Develops a waste management plan				
			27.01	Reviews waste stream being generated from construction activities		
			27.02	Determines where wastes can be reduced within the project		
			27.03	Determines which materials can be sent to recycling centres		
A5.		Development of a Human Resource Plan				
	28.	Determines the human resource needs				
			28.01	Arranges groups of tasks into job functions		
			28.02	Determines whether work is to be performed by in-house staff or by trade or professional subcontractors		
			28.03	Determines desired staffing complement		
			28.04	Identifies skills required of the key personnel		
			28.05	Plans the long-term approach to skills upgrading		
			28.06	Determines priorities to be used when establishing relationships with company employees, such as: profitability, quality control, business approach and ethics		
	29.	Prepares job descriptions for all employees				
			29.01	Assigns job functions to employees		
			29.02	Determines responsibilities and authority for each job		
	30.	Prepares plans to ensure the business has sufficient skilled human resources				
			30.01	Determines which skills should ideally be provided by employees of the business		
			30.02	Determines the training required to provide the needed skills and knowledge to the owner		
			30.03	Assesses the skills and knowledge that are available through the use of contract labour		
			30.04	Determines how human resources will be acquired		
B1.		Business Management				
	31.	Organizes and equips the business office				
			31.01	Develops an organizational chart		
			31.02	Develops internal office systems		
			31.03	Determines equipment and supplies required		
			31.04	Capitalizes on office equipment and product features to enhance efficiency		
			31.05	Recognizes the type of work for which a computer is most suited in the industry		
			31.06	Decides whether the operation would benefit from the use of a computer		
			31.07	Determines how a computer would be introduced into the business operation		
	32.	Develops clear instructions relating to job functions and tasks being delegated				
			32.01	Defines the task clearly - both what is to be done and why		
			32.02	Determines whether the individual can adequately perform the task		
			32.03	Defines clearly the level and limits of authority delegated		
			32.04	Provides assistance, as required to ensure that the task will be satisfactorily completed		
			32.05	Ensures that problems are clearly communicated		
	33.	Assesses value of information required to manage business				
			33.01	Decides when, and what, information is required in order to manage the operations of the business		
			33.02	Collects the necessary information		

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34.	Uses effective communication skills	33.03	Organizes the data in a format suitable for analysis						
		34.01	Speaks clearly and concisely						
		34.02	Uses language and terminology appropriate for the audience						
		34.03	Develops attitudes that facilitate verbal communications						
		34.04	Identifies the reasons for communication breakdowns						
		34.05	Provides appropriate feedback						
		34.06	Identifies those instances when written communication is most appropriate						
		34.07	Determines when verbal communications must be put in writing						
		34.08	Writes in a clear, correct and organized manner						
		34.09	Evaluates client concerns and provides appropriate response						
35.	Solicits employee input on business operations								
		35.01	Be accessible to staff						
		35.02	Conducts regular staff meetings						
		35.03	Outlines methods for employees to provide feedback						
36.	Demonstrates leadership								
		36.01	Implements the process of team building						
		36.02	Describes the relationship between the leader and the people						
		36.03	Explains the different levels of positive and negative motivation						
		36.04	Practices effective motivational skills						
		36.05	Emphasizes the personal benefits resulting from achieving expectations						
		36.06	Instills the desire to achieve						
37.	Outlines and communicates goal achievement measures								
		37.01	States short - and long - term goals and objectives clearly						
		37.02	Ensures that the staff are aware of the stated goals and objectives						
		37.03	Determines staff responsibilities in relation to attaining the goals						
		37.04	Outlines the process to be used in reviewing business progress in relation to the established goals and objectives						
		37.05	Identifies critical milestones for attaining goals						
		37.06	Indicates the timing for attaining goals and objectives						
38.	Ensures that staff is updated and informed about the operations of the business								
		38.01	Keeps staff informed about the operations of the business						
		38.02	Provides opportunities for staff to ask questions						
39.	Obtains appropriate business insurance, licences and permits								
		39.01	Obtains liability insurance						
		39.02	Obtains construction insurance						
		39.03	Registers with Workers' Compensation Board (WCB)						
40.	Protects the interests of the business								
		40.01	Ensures that the contract has been understood and agreed to by both parties						
		40.02	States all specifications and steps to be taken clearly						
		40.03	Determines the value of an arbitration clause in the contract						
		40.04	Maintains open lines of communications throughout the project						
		40.05	Documents activities with different projects						
		40.06	Details the steps in seeking a solution to client / contractor problem						
		40.07	Negotiates a fair and mutual settlement						
		40.08	Collects money on time						
B2.	Marketing and Sales								
		41.	Manages the marketing strategy						
		41.01	States to employees and subcontractors the corporate strategy and ensures they work to the stated level of performance						

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			41.02	Assesses the extent to which the individuals functioning within the business reflect the desired image					
			41.03	Assesses the extent of the actual business image to ensure it reflects the desired image					
			41.04	Employs business practices that reflect personal and client sensitiveness					
			41.05	Obtains and assesses feedback concerning the image of the business					
	42.	Manages the advertising plan	42.01	Oversees development and production of advertising materials to ensure consistency of message					
			42.02	Places advertising in selected media as applicable					
			42.03	Evaluates placement costs in relation to marketing budget					
			42.04	Assesses effectiveness of each media in relation to good leads per dollar spent by tracking the prospects					
			42.05	Removes less effective advertising placements					
	43.	Manages the public relations plan	43.01	Arranges for public relations activities for the business					
			43.02	Provides information to media on business products and activities					
	44.	Manages the sales program	44.01	Selects and recruits sales personnel to put sales program into effect					
			44.02	Develops sales presentation consistent with market plan					
			44.03	Arranges for training of sales people representing the business					
			44.04	Schedules sales activities					
			44.05	Obtains feedback from sales people relating to market acceptance					
			44.06	Develops and establishes closure procedures and an administrative framework for closing a sale					
			44.07	Ensures that sales staff is informed of production problems					
	45.	Manages the client referral plan	45.01	Ensures that the job is done right the first time					
			45.02	Requests acknowledgement of client satisfaction (letter of recommendation)					
			45.03	Sends or provides token of appreciation to customers					
			45.04	Revisits existing clients					
			45.05	Obtains permission to use certain projects for demonstration purposes					
			45.06	Lives up to the business's service policy					
	46.	Qualifies the prospect	46.01	Determines if the type of work proposed suits and is of interest to the business					
			46.02	Determines the seriousness and commitment of the customer					
			46.03	Assesses the competition for the project					
			46.04	Evaluates the time frame of the proposed work and ensures that the schedule can accommodate it					
			46.05	Determines the customer's ability to pay					
	47.	Assesses prospect expectations and needs	47.01	Develops a questionnaire in advance of sales calls designed to elicit information about client needs and expectations					
			47.02	Arranges the time and place for a meeting					
			47.03	Develops a method to obtain answers to questionnaire					
			47.04	Listens to and records customer input					
	48.	Develops sales and / or exit strategies	48.01	Assesses client					
			48.02	Prepares sales presentation					
			48.03	Uses effective closing techniques					
	49.	Obtains client commitment / contract							

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			49.01	Presents a proposal of work to be performed		
			49.02	Discusses details of the proposal with customer		
			49.03	Overcomes objectives that customers might have		
			49.04	Closes the deal and puts in place the mechanism to obtain signed contract		
			49.05	Accepts deposit		
B3. Financial Management						
	50. Establishes and maintains an accounting system that can be easily related to industry projects					
			50.01	Chooses an accountant who is familiar with the industry		
			50.02	Establishes accounting procedures which provide information for each project		
			50.03	Establishes accounting procedures which distinguish between fixed and variable overhead costs		
			50.04	Establishes accounting procedures which allow for regular and ongoing review		
			50.05	Explains the basic accounting principles associated with accounts receivable and payable		
			50.06	Maintains the appropriate documentation for accounts receivable and payable		
			50.07	Maintains a system that compares accounts receivable to accounts payable and cash flow		
			50.08	Establishes and maintains collection procedures for accounts receivable		
			50.09	Develops a system to ensure that accounts are paid within the terms outlined in credit agreements		
	51. Interprets financial statements and reports					
			51.01	Identifies the source of financial statements within the business		
			51.02	Interprets the contents of the balance sheet		
			51.03	Explains the different components of a balance sheet		
			51.04	Explains the concepts of assets and liabilities		
			51.05	Interprets profit and loss statements		
			51.06	Reads and interprets earned surplus or retained earnings statement		
			51.07	Explains some of the basic ratios associated with interpreting financial statement, such as working capital ratio and interest coverage ratio		
	52. Establishes required financing					
			52.01	Identifies the services and lending limits of banks, mortgage companies, mortgage brokers, credit unions and trust companies		
			52.02	Establishes an effective working relationship with account managers by keeping them informed of progress on specific projects and business in general		
	53. Negotiates payment terms with suppliers, subcontractors and developers					
			53.01	Determines normal credit arrangements		
			53.02	Negotiates new credit arrangements		
	54. Sets up and uses a system to control costs at all levels of the business operations					
			54.01	Implements a system for material purchases		
			54.02	Develops a system for field verification of materials and labour bills		
			54.03	Establishes and works within an approved budget		
	55. Sets up system to control cash flow					

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			55.01	Explains the purpose of a cash flow system		
			55.02	Predicts job costs and identifies points in time where cash resources will be required		
			55.03	Monitors and updates cash flow projections on a regular basis		
			55.04	Establishes lines of credit with different financial institutions		
	56.	Establishes and maintains a system for project cost control				
			56.01	Explains the concept of project cost control		
			56.02	Maintains accurate project costing records, including labour, materials, subcontractors, etc.		
			56.03	Compares actual project costs to budget figures		
			56.04	Makes necessary adjustments to future job estimates as required		
			56.05	Implements a purchase order system or puts in place alternatives to verify that supplier and subcontractor invoices correspond to goods and services		
			56.06	Maintains control over expenditures and productivity on the job site		
	57.	Establishes effective purchasing practices				
			57.01	Develops a needs list by category and alternatives		
			57.02	Investigates all sources of supply		
			57.03	Requests quotations and terms		
			57.04	Compares quotes		
			57.05	Reviews previous pricing		
			57.06	Makes buying decision		
			57.07	Documents purchases (issues P.O.'s)		
B4.	Human Resource Management					
	58.	Determines salary, benefits and incentive packages				
			58.01	Determines base salary rates for each job function - commensurates with duties and responsibilities performed		
			58.02	Determines benefits package to be provided		
			58.03	Holds regular reviews and performance ratings and adjusts salary accordingly		
			58.04	Offers additional bonus and incentive package such as a profit sharing plan		
	59.	Adopts effective recruiting practices				
			59.01	Evaluates the skill level required for a given job		
			59.02	Fills vacant positions		
			59.03	Explains the salary and compensation package to employees		
			59.04	Describes the remittance requirements		
			59.05	Abides by legislation governing employees in the workplace		
			59.06	Abides by the terms of collective agreements as applicable		
	60.	Recognizes the strengths and limitations of employees and assigns them work accordingly				
			60.01	Assesses employee skills and knowledge		
			60.02	Assigns work that challenges employees to do their best		
	61.	Provides clear instructions when assigning tasks				
			61.01	Defines the tasks to be performed clearly		
			61.02	Sets up a time schedule		
			61.03	Delegates a task		
	62.	Prepares evaluation criteria for employee performance				
			62.01	Develops rating system for scoring		
			62.02	Sets time periods for evaluations		
			62.03	Explains requirements to employees		

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63.	Provides skills development and educational upgrading for all employees	62.04	Ties remuneration increase to a promotion as a reward				
		63.01	Identifies career path opportunities for employees				
		63.02	Provides training for new employees or employees being phased into new jobs, ensuring that their performance meet the requirements				
		63.03	Identifies the role of training in phasing employees into positions of increasing responsibility				
		63.04	Determines skills upgrading requirements				
		63.05	Provides skills development and educational upgrading as a means of improving productivity and profitability				
		63.06	Establishes and maintains a skills development schedule				
		63.07	Allows employees to understand the operation and functions of the various parts of the business				
		63.08	Identifies appropriate skills development vehicles and knowledge upgrading programs				
		63.09	Encourages and makes arrangements for staff and self-attendance at courses and seminars				
		63.10	Evaluates benefits resulting from sending employees to upgrading programs				
B5. Project Management							
		64.	Ensures construction conforms to current codes and standards				
		64.01	Acquires the latest version of the Building Code				
		64.02	Attends code related training programs				
		64.03	Ensures all plans and specifications comply with codes				
		64.04	Ensures field staff are knowledgeable of codes and standards				
		65.	Keeps up-to-date with new products and building processes				
		65.01	Acquires information on products at shows				
		65.02	Subscribes to product and building magazines				
		65.03	Attends conference and meetings				
		65.04	Evaluates new products and discusses their application with suppliers and installers				
		66.	Demonstrates how building components work together as a system				
		66.01	Inspects building thoroughly				
		66.02	Identifies the different components of a building				
		66.03	Assesses the impact of renovation activity on the system				
		67.	Develops solutions to problems which result from building activities				
		67.01	Defines and exposes the problem				
		67.02	Develops and decides on the best possible solution				
		67.03	Maintains a rational perspective				
		68.	Performs thorough site investigation, checks on zoning and ensures all required permits are in place				
		68.01	Investigates site for irregularities				
		68.02	Ensures all construction related permits are in place				
		69.	Perform thorough house inspections				
		69.01	Inspects existing house systems				
		69.02	Investigates the parts of the house that will be affected by the proposed renovation				
		70.	Prepares designs, plans and specifications				
		70.01	Represents the design in plans and specifications				

				70.02	Reviews plans and specifications with the customer for approval prior to construction				
			71.	Estimates accurately all costs of the project					
				71.01	Employs a standard format for estimating project costs, ensuring that the format is detailed				
				71.02	Checks estimate to ensure that all hard and soft costs have been accounted for				
				71.03	Updates base costs on an ongoing basis				
				71.04	Provides cash allowances if and when specifications have not been adequately detailed or chosen by the home owner				
				71.05	Allows for a contingency as a means of protecting profit margin				
			72.	Prepares clear documentation for the bidding and tendering process					
				72.01	Prepares bid packages				
				72.02	Provides bid instructions for subcontractors and suppliers				
				72.03	Prepares clear and accurate documents for tenders				
			73.	Complies with contractual requirements					
				73.01	Identifies the major legal requirements of a contract				
				73.02	Identifies the difference between a verbal, a written contract and an interim contract				
				73.03	Ensures that all pages of a contract, plans and specifications are signed and initialed				
				73.04	Identifies addenda to contracts				
				73.05	Identifies those circumstances when it would be appropriate to use a lawyer				
				73.06	Utilizes the appropriate contract for a variety of conditions				
				73.07	Complies with standard clauses of a sales contract				
			74.	Prepares clear documentation to ensure an effective bidding and tendering process for subcontractors and suppliers					
				74.01	Prepares tender packages				
				74.02	Provides bid instructions for subcontractors and suppliers				
				75.01	Ensures contracts reflect terms for supply of goods and / or services to be supplied to site				
				75.02	Includes terms of payment for supply of materials and / or labour				
				75.03	Describes penalties for non-performance				
				76.	Plans and schedules the project				
				76.01	Describes the principles of project scheduling				
				76.02	Identifies the steps required to define and complete a job				
				76.03	Schedules project activities with project financing				
				76.04	Ensures materials can be obtained at the required time				
				76.05	Ensures work is scheduled to allow for inspections to be completed prior to the commencing of the next phase				
				76.06	Develops reporting mechanisms to determine project progress in accordance with plan				
			77.	Arranges contingency plans to deal with potential problems					
				77.01	Describes the resources available to solve problems that arise during construction				
				77.02	Maintains contingency time in the schedule for problem resolution				
				78.	Establishes and maintains an effective working relationship with the clients				
				78.01	Outlines clearly the business's policies and procedures				

			78.02	Explains to your customers the extent and limitations of your business's warranty program			
			78.03	Explains product features and responds to questions			
			78.04	Ensures clients are kept informed of the work in progress			
			78.05	Sets up regular job site meetings to ensure ongoing communication			
			78.06	Trains staff and subcontractors if need arises			
		79.		Addresses and resolves client problems an concerns			
			79.01	Maintains open lines of communication			
			79.02	Shows empathy for client concerns and responds quickly			
			79.03	Responds to clients concerns and complains honestly and diplomatically			
			79.04	Corrects the problem immediately whenever possible			
		80.		Provides after-sales service			
			80.01	Confirms and documents the business's service policy			
			80.02	Thanks client at job completion			
			80.03	Provides customer with warranty certificate			
			80.04	Responds to problems graciously and promptly			
B6.	Project Supervision						
		81.		Checks plans for errors and omissions			
			81.01	Reviews plans and specifications for irregularities or incompleteness			
			81.02	Implements necessary corrections			
		82.		Explains plans and schedules to all site personnel and to the client			
			82.01	Informs all site personnel of the construction schedule			
			82.02	Describes the construction schedule to the client			
		83.		Arranges for and acquires all required materials and labour			
			83.01	Places orders with suppliers and subtrades			
			83.02	Hires required field employees			
		84.		Performs site inspections to monitor job progress and compliance with plans and specifications			
			84.01	Arranges for mandatory inspections as required			
			84.02	Ensures regular staff inspections are conducted as required			
			84.03	Informs staff when inspections will be conducted			
		85.		Supervises activities on the site to make certain they are being performed to business standards			
			85.01	Practices good supervisory skills			
			85.02	Informs trades when slippage is occurring on a project schedule so that they can reschedule other work during the interim			
			85.03	Maintains effective communication links between all site personnel and trades			
			85.04	Demonstrates sensitivity to workers' morale and general concerns			
			85.05	Completes all paperwork associated with work on site			
			85.06	Completes all change orders for a contract			
			85.07	Ensures work site is kept neat, tidy and safe			
			85.08	Ensures work being performed by the subtrades is technically competent and recognizes when substandard work is being done			
			85.09	Ensures level of quality is in line with business policy at all stages of production			
		86.		Implements procedures for controlling site activity			
			86.01	Educates employees on business policy			
			86.02	Reinforces and re-evaluates policy continually			

Shaded areas indicate the level (awareness, knowledge or skill) that has been met for the tasks/subtasks.

			86.03	Makes decisions based on business policy		
			86.04	Provides rationale for policies		
			86.05	Uses purchase order systems		
			86.06	Maintains labour and subtrade reports (scheduling and financial)		
			86.07	Monitors progress and compares to original schedule		
			86.08	Tracks materials not being used		
	87.	Enforces safe working conditions				
			87.01	Complies with the requirements of Workplace Hazardous Material Information System (WHMIS)		
			87.02	Complies with the requirements of the Occupational Health and Safety Act		
	88.	Participates in project cost control				
			88.01	Implements cost control procedures		
			88.02	Ensures accurate records are maintained		
B7.	Client Relations					
		89.	Educates customers			
			89.01	Outlines clearly the business's policies and procedures		
			89.02	Explains to customers extent and limitations of business's warranty program		
			89.03	Includes clients in initial and ongoing inspections		
			89.04	Explains product features and responds to questions		
			89.05	Prepares clients for a temporary lifestyle change and inconveniences resulting from extensive renovation		
			89.06	Explains job flow procedures and reason for "dead days" (no worker on site)		
	90.	Addresses issue of client accountability				
			90.01	Confirms mutual responsibilities during the job		
			90.02	Initiates an after-sales service program for product / services		
C1.	Monitoring and Evaluation of Objectives					
		91.	Evaluates whether personal goals are being achieved			
			91.01	Identifies which personal goals are of the greatest importance		
			91.02	Gathers business performance information related to associated business goals		
			91.03	Assesses degree to which goals are being met		
	92.	Assesses whether a business objectives are being met				
			92.01	Gathers relevant information regarding stated business goals		
			92.02	Compares estimated performance with actual performance		
	93.	Determines if services being offered are appropriate				
			93.01	Assesses where income is being generated		
			93.02	Identifies specific services offered by business to customers		
			93.03	Compares income generation to services offered		
	94.	Assesses the approach to business				
			94.01	Determines if time spent by one's self is reasonable and useful		
			94.02	Considers alternative staffing arrangements		
			94.03	Assesses one's self in relation to business growth and advancement		
C2.	Monitoring and Evaluation of Marketing and Sales Plans					
		95.	Determines why prospects came to the business			
			95.01	Develops procedures for tracking prospects		
			95.02	Records responses in a prescribed standard format		
			95.03	Assesses survey results and matches findings to marketing initiatives		

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	96.	Determines why prospects purchased or did not purchase the product	96.01	Conducts ongoing evaluation with prospects and customers regarding the purchase decision		
			96.02	Identifies problems with unpopular products		
	93.	Reviews market situations / realities	97.01	Prepares detailed project reports covering a one-to-two year period		
			97.02	Determines total sales in the marketplace with total projects sold by the business		
			97.03	Compares sales volume with historical records on a month-to-month basis and by category		
			97.04	Determines actual selling prices throughout the marketplace		
			97.05	Develops criteria to compare similar jobs		
			97.06	Reviews economic indicators on interest rates, job creation and market expansions / contractions		
	98.	Compares monthly sales volume with projected sales volume and determines reasons for variances				
			98.01	Gathers accurate monthly sales reports		
			98.02	Compares actual sales to estimated sales		
	99.	Determines sales coming from target market				
			99.01	Prepares customer profiles for each product sold		
			99.02	Establishes ratio of estimates to sales		
			99.03	Develops a category analysis (breakdown by job category)		
			99.04	Confirms the profile of the planned target market		
	100.	Determines sales resulting from client referral plan				
			100.01	Determines how customers came to your business		
			100.02	Identifies customers referred to business by other customers		
	101.	Determines whether business is positioned as planned				
			101.01	Collects information from prospects and customers on their perception of the business		
			101.02	Gathers information from trades, staff and professionals regarding their perception of the business		
C3.	Monitoring and Evaluation of the Financial Plan					
			102.	Reviews financial reports		
			102.01	Reviews and assesses monthly statements		
			102.02	Ensures that the financial reports are accurate and reflect the true situation (i.e., accrual basis)		
			102.03	Evaluates business performance		
	103.	Compares financial reports against budget expectations				
			103.01	Gets current (actual), timely data		
			103.02	Compares the actual financial report to the original budget for variances		
			103.03	Analyzes variances		
			103.04	Develops and executes an action plan		
	104.	Prepares final report on each project				
			104.01	Sets up a system to track job costs		
			104.02	Documents the cost estimate for a project and compares it to the actual cost upon completion		
			104.03	Calculates business's profit or loss on a project as a percentage		
			104.04	Determines ways to reduce variances in future projects		
	105.	Compares actual margins with expected margins				

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			105.01	Monitors job cost control system on a continual basis		
			105.02	Reviews monthly financial statements		
			105.03	Reviews cost reports on each project		
	106.	Evaluates requirements for cash flow and capital				
			106.01	Monitors payables versus receivables		
			106.02	Establishes cash flow requirements		
			106.03	Satisfies cash flow requirements		
			106.04	Compares actual capital requirements to original estimate		
C4.	Monitoring and Evaluation of the Operating Plan					
	107.	Monitors operating performance indicators				
			107.01	Collects information on employee performance and production efficiencies		
			107.02	Collects information on sales and financial indicators		
	108.	Monitors type and frequency of customer complaints				
			108.01	Develops a centralized record system for logging complaints by job and by stage of work		
			108.02	Develops a system for reporting complaints received, action taken and results achieved on a regular basis		
			108.03	Assesses ability of the business to respond to customer complaints		
	109.	Monitors the effectiveness of problem solving				
			109.01	Assesses number of problems identified in the business from all areas		
			109.02	Assesses the number of complaints directed at the quality of work performed		
			109.03	Analyzes complaints to identify causes of most common complaints		
			109.04	Determines if response and solution to problems are acceptable		
	110.	Develops options for improving business performance				
			110.01	Assesses the business's performance in relation to goals and objectives		
			110.02	Determines those areas which are in need of improvement		
			110.03	Consults with staff to explore options to improve business performance		
			110.04	Lists the options which are available for improving business performance		
	111.	Assesses options and modifies plans				
			111.01	Assesses existing business plan in relation to its suitability for the next business cycle		
			111.02	Assesses options for modifying plans		
			111.03	Revises or modifies existing business plan or prepares new business plan		
	112.	Revises procedures				
			112.01	Implements new procedures consistent with the revised plan		
			112.02	Communicates new systems and procedures with employees and subcontractors		
			112.03	Monitors implementation of the new procedures		
C5.	Monitoring and Evaluation of Human Resources					
			113.	Assesses performance of employees		
			113.01	Evaluates productivity of employees in performing their job		
			113.02	Evaluates how employees work with their peers		

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			113.03	Evaluates employees' performance in relation to the client and trades		
			113.04	Conducts performance review meeting with the employees		
	114. Compares staff salaries with industry / market standards		114.01	Determines industry standards for salaries for various job categories		
			114.02	Determines the comparable salary to pay when including benefits package		
			114.03	Compares the value of the work performed by the employees in relation to industry standards		
	115. Determines effectiveness of training initiatives		115.01	Identifies training activities conducted		
			115.02	Describes expected results from training		
			115.03	Determines employees perspective on training initiatives		
			115.04	Identifies additional training requirements		

SUB-BLOCK	TASK	SUBTASK	Awareness	Knowledge	Skill
A1.	Definition of Business Goals				
	1. Establish personal goals				
		1.01 Clarifies the reasons for starting or continuing business			
		1.02 Defines what is to be accomplished			
		1.03 Defines and records achievable and measurable goals for the short and long term			
		1.04 Determines the opportunity costs of investing your money elsewhere			
		1.05 Determines if you are prepared to make the necessary personal sacrifice			
	2. Establishes business goals				
		2.01 Assesses the changing trends and approaches affecting the residential industry			
		2.02 Establishes short - and long - term objectives			
		2.03 Applies personal goals to business goals			
		2.04 Determines financial goals			
		2.05 Determines the desired business image			
		2.06 Develops a business mission statement			
	3. Determines scope of services				
		3.01 Determines type of services being offered in the marketplace			
		3.02 Determines which services are required for the business to reach its objectives			
	4. Determines business approach				
		4.01 Determines the expected size of the business			
		4.02 Determines the form / structure of the business			
		4.03 Determines elements of business operations to be performed in-house and those which will be subcontracted			
		4.04 Determines what tasks to do personally			
A2.	Development of Marketing and Sales Plans				
	5. Determines the general market environment				
		5.01 Assesses the market conditions			
		5.02 Identifies market opportunities			
	6. Determines the target market				
		6.01 Determines the needs and wants of the market			
		6.02 Defines which group of purchasers would be interested in the product			
		6.03 Clearly defines which purchaser groups you want to have an interest in your product			
		6.04 Defines the type of people in the industry one wants to work with			
	7. Determines where the business should be positioned				
		7.01 Determines the manner in which the business provides greater value than that of competitors			
		7.02 Decides how target group prospects should perceive your business / product and compare it to others			
		7.03 Gathers feedback from the target group concerning the business position			
	8. Develops a pricing strategy				
		8.01 Determines projected cost of products including mark-up			
		8.02 Determines market prices for comparable products			
		8.03 Establishes asking price for products, based on business positioning, marketing strategy and margin requirements			

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9.	Develops an original strategy for the marketing activities	9.01	Decides on the message that you want to convey to the target audience							
		9.02	Identifies techniques to effectively communicate the message to the target market							
		9.03	Creates a unique marketing image that makes your product and business stand out from all others							
10.	Develops a sales strategy for the business									
		10.01	Develops the basic tasks associated with selling							
		10.02	Identifies the advantages and disadvantages between selling yourself, using your staff and using an agent							
		10.03	Determines at what point of the year you will sell your products							
		10.04	Determines the effect upon sales of site presentation and business							
11.	Develops a public relations plan									
		11.01	Demonstrates the importance of public relations							
		11.02	Determines public relations options best suited to your marketing strategy and business positioning							
		11.03	Prepares a public relations plan							
		11.04	Develops a budget for public relations activities							
12.	Determines the marketing tools to be used									
		12.01	Decides on the kind of methods one will use to reach the target groups with the message about the product and business							
		12.02	Determines the amount of money to be allocated to marketing							
		12.03	Determines when each method will be employed and over what time period							
		12.04	Determines the optimum marketing tool for the product / business using cost effectiveness data							
13.	Develops an advertising plan									
		13.01	Assesses objectives							
		13.02	Allocates budget							
		13.03	Develops a monthly advertising plan							
		13.04	Evaluates and selects medium							
		13.05	Develops advertising materials consistent with marketing strategy							
		13.06	Develops copy - for letterhead, business cards, advertising, signage and other promotional vehicles - consistent with the corporate image							
		13.07	Selects the market areas and media for placement of advertising							
		13.08	Establishes a purchasing plan							
		13.09	Obtains co-operation and financial support from suppliers							
		13.10	Develops a procedure for tracking results							
14.	Develops a client referral plan									
		14.01	Determines how previous clients can assist in marketing the business							
		14.02	Identifies alternative means of communicating client satisfaction in the business's product and / or service to the target market							
		14.03	Communicates the client referral plan to the staff, subcontractors and prospective clients							
A3.	Development of a Financial Plan									
15.	Prepares pro forma income statements									
		15.01	Projects expected gross revenue from sales of the products and services							
		15.02	Determines the cost of producing the product or providing the service							
		15.03	Estimates the cost of operating the business							

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	16.	Develops pro forma balance sheet		15.04	Determines the expected net income			
				15.05	Determines the risk involved in working to the projected level			
				16.01	Identifies all assets of the business			
				16.02	Identifies all liabilities of the business			
				16.03	Determines the shareholder's equity and retained earnings			
	17.	Prepares cash flow estimates		17.01	Determines the timing and amount of payments for goods, services and office operations			
				17.02	Estimates timing of income to be received			
				17.03	Determines the amount of bridge (temporary) financing required to satisfy the expected payment schedule			
	18.	Develops a long-term financial plan		18.01	Estimates future sales possibilities			
				18.02	Determines requirement for capital and establishes plan for acquisition			
				18.03	Assesses the effects of recessions, booms and normal industry cycles			
				18.04	Estimates return on investment			
	19.	Determines required mark-ups		19.01	Determines projected cost of production			
				19.02	Determines projected cost of operating the business			
				19.03	Determines projected business profit			
				19.04	Determines required mark-up of production costs to cover operating costs and desired profit			
				19.05	Alters mark-up based on market conditions			
	A4.	Development of an Operating Plan						
	20.	Develops a code of ethics to cover all business operations		20.01	Recognizes the importance of ethical standards in relation to long-term reputation			
				20.02	Determines ethical standard for working with employees, subcontractors, prospects and clients			
	21.	Develops a land / property acquisition plan						
				21.01	Determines type of land / property required to support your market position			
				21.02	Determines availability of suitable land / property			
				22.01	Determines design and drafting requirements			
				22.02	Assesses computerized design and drafting options			
	23.	Develops an estimating plan		23.01	Determines cost estimating methods			
				23.02	Determines a procedure for gathering bids from trades and suppliers			
	24.	Develops a contract administration plan		24.01	Establishes change order procedures			
				24.02	Develops a contract package			
				24.03	Explains the major legal requirements of a contract			
				24.04	Explains the difference between a verbal, a written contract and an interim contract			
				24.05	Signs and initials all pages of a contract, plans and specifications			
				25.01	Establishes quality standards for the business			
				25.02	Develops inspection procedures			
	26.	Develops a customer service program		26.01	Establishes a philosophy for customer service			

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			26.02	Develops customer service policies			
			26.03	Establishes a level of customer service			
	27.	Develops a waste management plan					
			27.01	Reviews waste stream being generated from construction activities			
			27.02	Determines where wastes can be reduced within the project			
			27.03	Determines which materials can be sent to recycling centres			
A5.		Development of a Human Resource Plan					
	28.	Determines the human resource needs					
			28.01	Arranges groups of tasks into job functions			
			28.02	Determines whether work is to be performed by in-house staff or by trade or professional subcontractors			
			28.03	Determines desired staffing complement			
			28.04	Identifies skills required of the key personnel			
			28.05	Plans the long-term approach to skills upgrading			
			28.06	Determines priorities to be used when establishing relationships with company employees, such as: profitability, quality control, business approach and ethics			
	29.	Prepares job descriptions for all employees					
			29.01	Assigns job functions to employees			
			29.02	Determines responsibilities and authority for each job			
	30.	Prepares plans to ensure the business has sufficient skilled human resources					
			30.01	Determines which skills should ideally be provided by employees of the business			
			30.02	Determines the training required to provide the needed skills and knowledge to the owner			
			30.03	Assesses the skills and knowledge that are available through the use of contract labour			
			30.04	Determines how human resources will be acquired			
B1.		Business Management					
	31.	Organizes and equips the business office					
			31.01	Develops an organizational chart			
			31.02	Develops internal office systems			
			31.03	Determines equipment and supplies required			
			31.04	Capitalizes on office equipment and product features to enhance efficiency			
			31.05	Recognizes the type of work for which a computer is most suited in the industry			
			31.06	Decides whether the operation would benefit from the use of a computer			
			31.07	Determines how a computer would be introduced into the business operation			
	32.	Develops clear instructions relating to job functions and tasks being delegated					
			32.01	Defines the task clearly - both what is to be done and why			
			32.02	Determines whether the individual can adequately perform the task			
			32.03	Defines clearly the level and limits of authority delegated			
			32.04	Provides assistance, as required to ensure that the task will be satisfactorily completed			
			32.05	Ensures that problems are clearly communicated			
	33.	Assesses value of information required to manage business					
			33.01	Decides when, and what, information is required in order to manage the operations of the business			
			33.02	Collects the necessary information			

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	34.	Uses effective communication skills	33.03	Organizes the data in a format suitable for analysis				
			34.01	Speaks clearly and concisely				
			34.02	Uses language and terminology appropriate for the audience				
			34.03	Develops attitudes that facilitate verbal communications				
			34.04	Identifies the reasons for communication breakdowns				
			34.05	Provides appropriate feedback				
			34.06	Identifies those instances when written communication is most appropriate				
			34.07	Determines when verbal communications must be put in writing				
			34.08	Writes in a clear, correct and organized manner				
			34.09	Evaluates client concerns and provides appropriate response				
	35.	Solicits employee input on business operations						
			35.01	Be accessible to staff				
			35.02	Conducts regular staff meetings				
			35.03	Outlines methods for employees to provide feedback				
	36.	Demonstrates leadership						
			36.01	Implements the process of team building				
			36.02	Describes the relationship between the leader and the people				
			36.03	Explains the different levels of positive and negative motivation				
			36.04	Practices effective motivational skills				
			36.05	Emphasizes the personal benefits resulting from achieving expectations				
			36.06	Instills the desire to achieve				
	37.	Outlines and communicates goal achievement measures						
			37.01	States short - and long - term goals and objectives clearly				
			37.02	Ensures that the staff are aware of the stated goals and objectives				
			37.03	Determines staff responsibilities in relation to attaining the goals				
			37.04	Outlines the process to be used in reviewing business progress in relation to the established goals and objectives				
			37.05	Identifies critical milestones for attaining goals				
			37.06	Indicates the timing for attaining goals and objectives				
	38.	Ensures that staff is updated and informed about the operations of the business						
			38.01	Keeps staff informed about the operations of the business				
			38.02	Provides opportunities for staff to ask questions				
	39.	Obtains appropriate business insurance, licences and permits						
			39.01	Obtains liability insurance				
			39.02	Obtains construction insurance				
			39.03	Registers with Workers' Compensation Board (WCB)				
	40.	Protects the interests of the business						
			40.01	Ensures that the contract has been understood and agreed to by both parties				
			40.02	States all specifications and steps to be taken clearly				
			40.03	Determines the value of an arbitration clause in the contract				
			40.04	Maintains open lines of communications throughout the project				
			40.05	Documents activities with different projects				
			40.06	Details the steps in seeking a solution to client / contractor problem				
			40.07	Negotiates a fair and mutual settlement				
			40.08	Collects money on time				
B2.	Marketing and Sales							
	41.	Manages the marketing strategy						
			41.01	States to employees and subcontractors the corporate strategy and ensures they work to the stated level of performance				

Shaded areas indicate the level (awareness, knowledge or skill) that has been met for the tasks/subtasks.

				49.01	Presents a proposal of work to be performed	
				49.02	Discusses details of the proposal with customer	
				49.03	Overcomes objectives that customers might have	
				49.04	Closes the deal and puts in place the mechanism to obtain signed contract	
				49.05	Accepts deposit	
B3. Financial Management						
	50. Establishes and maintains an accounting system that can be easily related to industry projects					
				50.01	Chooses an accountant who is familiar with the industry	
				50.02	Establishes accounting procedures which provide information for each project	
				50.03	Establishes accounting procedures which distinguish between fixed and variable overhead costs	
				50.04	Establishes accounting procedures which allow for regular and ongoing review	
				50.05	Explains the basic accounting principles associated with accounts receivable and payable	
				50.06	Maintains the appropriate documentation for accounts receivable and payable	
				50.07	Maintains a system that compares accounts receivable to accounts payable and cash flow	
				50.08	Establishes and maintains collection procedures for accounts receivable	
				50.09	Develops a system to ensure that accounts are paid within the terms outlined in credit agreements	
	51. Interprets financial statements and reports					
				51.01	Identifies the source of financial statements within the business	
				51.02	Interprets the contents of the balance sheet	
				51.03	Explains the different components of a balance sheet	
				51.04	Explains the concepts of assets and liabilities	
				51.05	Interprets profit and loss statements	
				51.06	Reads and interprets earned surplus or retained earnings statement	
				51.07	Explains some of the basic ratios associated with interpreting financial statement, such as working capital ratio and interest coverage ratio	
	52. Establishes required financing					
				52.01	Identifies the services and lending limits of banks, mortgage companies, mortgage brokers, credit unions and trust companies	
				52.02	Establishes an effective working relationship with account managers by keeping them informed of progress on specific projects and business in general	
	53. Negotiates payment terms with suppliers, subcontractors and developers					
				53.01	Determines normal credit arrangements	
				53.02	Negotiates new credit arrangements	
	54. Sets up and uses a system to control costs at all levels of the business operations					
				54.01	Implements a system for material purchases	
				54.02	Develops a system for field verification of materials and labour bills	
				54.03	Establishes and works within an approved budget	
	55. Sets up system to control cash flow					

Shaded areas indicate the level (awareness, knowledge or skill) that has been met for the tasks/subtasks.

			55.01	Explains the purpose of a cash flow system			
			55.02	Predicts job costs and identifies points in time where cash resources will be required			
			55.03	Monitors and updates cash flow projections on a regular basis			
			55.04	Establishes lines of credit with different financial institutions			
	56.	Establishes and maintains a system for project cost control					
			56.01	Explains the concept of project cost control			
			56.02	Maintains accurate project costing records, including labour, materials, subcontractors, etc.			
			56.03	Compares actual project costs to budget figures			
			56.04	Makes necessary adjustments to future job estimates as required			
			56.05	Implements a purchase order system or puts in place alternatives to verify that supplier and subcontractor invoices correspond to goods and services			
			56.06	Maintains control over expenditures and productivity on the job site			
	57.	Establishes effective purchasing practices					
			57.01	Develops a needs list by category and alternatives			
			57.02	Investigates all sources of supply			
			57.03	Requests quotations and terms			
			57.04	Compares quotes			
			57.05	Reviews previous pricing			
			57.06	Makes buying decision			
			57.07	Documents purchases (issues P.O.'s)			
B4.	Human Resource Management						
	58.	Determines salary, benefits and incentive packages					
			58.01	Determines base salary rates for each job function - commensurates with duties and responsibilities performed			
			58.02	Determines benefits package to be provided			
			58.03	Holds regular reviews and performance ratings and adjusts salary accordingly			
			58.04	Offers additional bonus and incentive package such as a profit sharing plan			
	59.	Adopts effective recruiting practices					
			59.01	Evaluates the skill level required for a given job			
			59.02	Fills vacant positions			
			59.03	Explains the salary and compensation package to employees			
			59.04	Describes the remittance requirements			
			59.05	Abides by legislation governing employees in the workplace			
			59.06	Abides by the terms of collective agreements as applicable			
	60.	Recognizes the strengths and limitations of employees and assigns them work accordingly					
			60.01	Assesses employee skills and knowledge			
			60.02	Assigns work that challenges employees to do their best			
	61.	Provides clear instructions when assigning tasks					
			61.01	Defines the tasks to be performed clearly			
			61.02	Sets up a time schedule			
			61.03	Delegates a task			
	62.	Prepares evaluation criteria for employee performance					
			62.01	Develops rating system for scoring			
			62.02	Sets time periods for evaluations			
			62.03	Explains requirements to employees			

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63.	Provides skills development and educational upgrading for all employees	62.04	Ties remuneration increase to a promotion as a reward	
		63.01	Identifies career path opportunities for employees	
		63.02	Provides training for new employees or employees being phased into new jobs, ensuring that their performance meet the requirements	
		63.03	Identifies the role of training in phasing employees into positions of increasing responsibility	
		63.04	Determines skills upgrading requirements	
		63.05	Provides skills development and educational upgrading as a means of improving productivity and profitability	
		63.06	Establishes and maintains a skills development schedule	
		63.07	Allows employees to understand the operation and functions of the various parts of the business	
		63.08	Identifies appropriate skills development vehicles and knowledge upgrading programs	
		63.09	Encourages and makes arrangements for staff and self-attendance at courses and seminars	
		63.10	Evaluates benefits resulting from sending employees to upgrading programs	
B5. Project Management				
64.	Ensures construction conforms to current codes and standards			
		64.01	Acquires the latest version of the Building Code	
		64.02	Attends code related training programs	
		64.03	Ensures all plans and specifications comply with codes	
		64.04	Ensures field staff are knowledgeable of codes and standards	
65.	Keeps up-to-date with new products and building processes			
		65.01	Acquires information on products at shows	
		65.02	Subscribes to product and building magazines	
		65.03	Attends conference and meetings	
		65.04	Evaluates new products and discusses their application with suppliers and installers	
66.	Demonstrates how building components work together as a system			
		66.01	Inspects building thoroughly	
		66.02	Identifies the different components of a building	
		66.03	Assesses the impact of renovation activity on the system	
67.	Develops solutions to problems which result from building activities			
		67.01	Defines and exposes the problem	
		67.02	Develops and decides on the best possible solution	
		67.03	Maintains a rational perspective	
68.	Performs thorough site investigation, checks on zoning and ensures all required permits are in place			
		68.01	Investigates site for irregularities	
		68.02	Ensures all construction related permits are in place	
69.	Perform thorough house inspections			
		69.01	Inspects existing house systems	
		69.02	Investigates the parts of the house that will be affected by the proposed renovation	
70.	Prepares designs, plans and specifications			
		70.01	Represents the design in plans and specifications	

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71.	Estimates accurately all costs of the project	70.02	Reviews plans and specifications with the customer for approval prior to construction	
71.01			Employs a standard format for estimating project costs, ensuring that the format is detailed	
71.02			Checks estimate to ensure that all hard and soft costs have been accounted for	
71.03			Updates base costs on an ongoing basis	
71.04			Provides cash allowances if and when specifications have not been adequately detailed or chosen by the home owner	
71.05			Allows for a contingency as a means of protecting profit margin	
72.	Prepares clear documentation for the bidding and tendering process			
72.01			Prepares bid packages	
72.02			Provides bid instructions for subcontractors and suppliers	
72.03			Prepares clear and accurate documents for tenders	
73.	Complies with contractual requirements			
73.01			Identifies the major legal requirements of a contract	
73.02			Identifies the difference between a verbal, a written contract and an interim contract	
73.03			Ensures that all pages of a contract, plans and specifications are signed and initialed	
73.04			Identifies addenda to contracts	
73.05			Identifies those circumstances when it would be appropriate to use a lawyer	
73.06			Utilizes the appropriate contract for a variety of conditions	
73.07			Complies with standard clauses of a sales contract	
74.	Prepares clear documentation to ensure an effective bidding and tendering process for subcontractors and suppliers			
74.01			Prepares tender packages	
74.02			Provides bid instructions for subcontractors and suppliers	
75.	Prepares contracts to hire subcontractors and suppliers			
75.01			Ensures contracts reflect terms for supply of goods and / or services to be supplied to site	
75.02			Includes terms of payment for supply of materials and / or labour	
75.03			Describes penalties for non-performance	
76.	Plans and schedules the project			
76.01			Describes the principles of project scheduling	
76.02			Identifies the steps required to define and complete a job	
76.03			Schedules project activities with project financing	
76.04			Ensures materials can be obtained at the required time	
76.05			Ensures work is scheduled to allow for inspections to be completed prior to the commencing of the next phase	
76.06			Develops reporting mechanisms to determine project progress in accordance with plan	
77.	Arranges contingency plans to deal with potential problems			
77.01			Describes the resources available to solve problems that arise during construction	
77.02			Maintains contingency time in the schedule for problem resolution	
78.	Establishes and maintains an effective working relationship with the clients			
78.01			Outlines clearly the business's policies and procedures	

			78.02	Explains to your customers the extent and limitations of your business's warranty program			
			78.03	Explains product features and responds to questions			
			78.04	Ensures clients are kept informed of the work in progress			
			78.05	Sets up regular job site meetings to ensure ongoing communication			
			78.06	Trains staff and subcontractors if need arises			
		79.		Addresses and resolves client problems an concerns			
			79.01	Maintains open lines of communication			
			79.02	Shows empathy for client concerns and responds quickly			
			79.03	Responds to clients concerns and complains honestly and diplomatically			
			79.04	Corrects the problem immediately whenever possible			
		80.		Provides after-sales service			
			80.01	Confirms and documents the business's service policy			
			80.02	Thanks client at job completion			
			80.03	Provides customer with warranty certificate			
			80.04	Responds to problems graciously and promptly			
B6.	Project Supervision						
		81.		Checks plans for errors and omissions			
			81.01	Reviews plans and specifications for irregularities or incompleteness			
			81.02	Implements necessary corrections			
		82.		Explains plans and schedules to all site personnel and to the client			
			82.01	Informs all site personnel of the construction schedule			
			82.02	Describes the construction schedule to the client			
		83.		Arranges for and acquires all required materials and labour			
			83.01	Places orders with suppliers and subtrades			
			83.02	Hires required field employees			
		84.		Performs site inspections to monitor job progress and compliance with plans and specifications			
			84.01	Arranges for mandatory inspections as required			
			84.02	Ensures regular staff inspections are conducted as required			
			84.03	Informs staff when inspections will be conducted			
		85.		Supervises activities on the site to make certain they are being performed to business standards			
			85.01	Practices good supervisory skills			
			85.02	Informs trades when slippage is occurring on a project schedule so that they can reschedule other work during the interim			
			85.03	Maintains effective communication links between all site personnel and trades			
			85.04	Demonstrates sensitivity to workers' morale and general concerns			
			85.05	Completes all paperwork associated with work on site			
			85.06	Completes all change orders for a contract			
			85.07	Ensures work site is kept neat, tidy and safe			
			85.08	Ensures work being performed by the subtrades is technically competent and recognizes when substandard work is being done			
			85.09	Ensures level of quality is in line with business policy at all stages of production			
		86.		Implements procedures for controlling site activity			
			86.01	Educates employees on business policy			
			86.02	Reinforces and re-evaluates policy continually			

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			86.03	Makes decisions based on business policy		
			86.04	Provides rationale for policies		
			86.05	Uses purchase order systems		
			86.06	Maintains labour and subtrade reports (scheduling and financial)		
			86.07	Monitors progress and compares to original schedule		
			86.08	Tracks materials not being used		
		87.		Enforces safe working conditions		
			87.01	Complies with the requirements of Workplace Hazardous Material Information System (WHMIS)		
			87.02	Complies with the requirements of the Occupational Health and Safety Act		
		88.		Participates in project cost control		
			88.01	Implements cost control procedures		
			88.02	Ensures accurate records are maintained		
B7.	Client Relations					
		89.		Educates customers		
			89.01	Outlines clearly the business's policies and procedures		
			89.02	Explains to customers extent and limitations of business's warranty program		
			89.03	Includes clients in initial and ongoing inspections		
			89.04	Explains product features and responds to questions		
			89.05	Prepares clients for a temporary lifestyle change and inconveniences resulting from extensive renovation		
			89.06	Explains job flow procedures and reason for "dead days" (no worker on site)		
		90.		Addresses issue of client accountability		
			90.01	Confirms mutual responsibilities during the job		
			90.02	Initiates an after-sales service program for product / services		
C1.	Monitoring and Evaluation of Objectives					
		91.		Evaluates whether personal goals are being achieved		
			91.01	Identifies which personal goals are of the greatest importance		
			91.02	Gathers business performance information related to associated business goals		
			91.03	Assesses degree to which goals are being met		
		92.		Assesses whether a business objectives are being met		
			92.01	Gathers relevant information regarding stated business goals		
			92.02	Compares estimated performance with actual performance		
		93.		Determines if services being offered are appropriate		
			93.01	Assesses where income is being generated		
			93.02	Identifies specific services offered by business to customers		
			93.03	Compares income generation to services offered		
		94.		Assesses the approach to business		
			94.01	Determines if time spent by one's self is reasonable and useful		
			94.02	Considers alternative staffing arrangements		
			94.03	Assesses one's self in relation to business growth and advancement		
C2.	Monitoring and Evaluation of Marketing and Sales Plans					
		95.		Determines why prospects came to the business		
			95.01	Develops procedures for tracking prospects		
			95.02	Records responses in a prescribed standard format		
			95.03	Assesses survey results and matches findings to marketing initiatives		

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	96.	Determines why prospects purchased or did not purchase the product	96.01	Conducts ongoing evaluation with prospects and customers regarding the purchase decision			
			96.02	Identifies problems with unpopular products			
	93.	Reviews market situations / realities	97.01	Prepares detailed project reports covering a one-to-two year period			
			97.02	Determines total sales in the marketplace with total projects sold by the business			
			97.03	Compares sales volume with historical records on a month-to-month basis and by category			
			97.04	Determines actual selling prices throughout the marketplace			
			97.05	Develops criteria to compare similar jobs			
			97.06	Reviews economic indicators on interest rates, job creation and market expansions / contractions			
	98.	Compares monthly sales volume with projected sales volume and determines reasons for variances					
			98.01	Gathers accurate monthly sales reports			
			98.02	Compares actual sales to estimated sales			
	99.	Determines sales coming from target market					
			99.01	Prepares customer profiles for each product sold			
			99.02	Establishes ratio of estimates to sales			
			99.03	Develops a category analysis (breakdown by job category)			
			99.04	Confirms the profile of the planned target market			
	100.	Determines sales resulting from client referral plan					
			100.01	Determines how customers came to your business			
			100.02	Identifies customers referred to business by other customers			
	101.	Determines whether business is positioned as planned					
			101.01	Collects information from prospects and customers on their perception of the business			
			101.02	Gathers information from trades, staff and professionals regarding their perception of the business			
C3.	Monitoring and Evaluation of the Financial Plan						
	102.	Reviews financial reports					
			102.01	Reviews and assesses monthly statements			
			102.02	Ensures that the financial reports are accurate and reflect the true situation (i.e., accrual basis)			
			102.03	Evaluates business performance			
	103.	Compares financial reports against budget expectations					
			103.01	Gets current (actual), timely data			
			103.02	Compares the actual financial report to the original budget for variances			
			103.03	Analyzes variances			
			103.04	Develops and executes an action plan			
	104.	Prepares final report on each project					
			104.01	Sets up a system to track job costs			
			104.02	Documents the cost estimate for a project and compares it to the actual cost upon completion			
			104.03	Calculates business's profit or loss on a project as a percentage			
			104.04	Determines ways to reduce variances in future projects			
	105.	Compares actual margins with expected margins					

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			105.01	Monitors job cost control system on a continual basis		
			105.02	Reviews monthly financial statements		
			105.03	Reviews cost reports on each project		
	106. Evaluates requirements for cash flow and capital					
			106.01	Monitors payables versus receivables		
			106.02	Establishes cash flow requirements		
			106.03	Satisfies cash flow requirements		
			106.04	Compares actual capital requirements to original estimate		
C4. Monitoring and Evaluation of the Operating Plan						
	107. Monitors operating performance indicators					
			107.01	Collects information on employee performance and production efficiencies		
			107.02	Collects information on sales and financial indicators		
	108. Monitors type and frequency of customer complaints					
			108.01	Develops a centralized record system for logging complaints by job and by stage of work		
			108.02	Develops a system for reporting complaints received, action taken and results achieved on a regular basis		
			108.03	Assesses ability of the business to respond to customer complaints		
	109. Monitors the effectiveness of problem solving					
			109.01	Assesses number of problems identified in the business from all areas		
			109.02	Assesses the number of complaints directed at the quality of work performed		
			109.03	Analyzes complaints to identify causes of most common complaints		
			109.04	Determines if response and solution to problems are acceptable		
	110. Develops options for improving business performance					
			110.01	Assesses the business's performance in relation to goals and objectives		
			110.02	Determines those areas which are in need of improvement		
			110.03	Consults with staff to explore options to improve business performance		
			110.04	Lists the options which are available for improving business performance		
	111. Assesses options and modifies plans					
			111.01	Assesses existing business plan in relation to its suitability for the next business cycle		
			111.02	Assesses options for modifying plans		
			111.03	Revises or modifies existing business plan or prepares new business plan		
	112. Revises procedures					
			112.01	Implements new procedures consistent with the revised plan		
			112.02	Communicates new systems and procedures with employees and subcontractors		
			112.03	Monitors implementation of the new procedures		
C5. Monitoring and Evaluation of Human Resources						
	113. Assesses performance of employees					
			113.01	Evaluates productivity of employees in performing their job		
			113.02	Evaluates how employees work with their peers		

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			113.03	Evaluates employees' performance in relation to the client and trades Conducts performance review meeting with the employees			
			113.04				
	114. Compares staff salaries with industry / market standards		114.01	Determines industry standards for salaries for various job categories Determines the comparable salary to pay when including benefits package			
			114.02				
			114.03	Compares the value of the work performed by the employees in relation to industry standards			
	115. Determines effectiveness of training initiatives		115.01	Identifies training activities conducted			
			115.02	Describes expected results from training			
			115.03	Determines employees perspective on training initiatives			
			115.04	Identifies additional training requirements			

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APPENDIX B

Canadian Regional/Provincial Programs

Certification Criteria

Province/Region	Victoria, Australia
Program Name	Registered Building Practitioners
Target Audience	New home builders and renovators in Victoria must be registered (effectively licensed) by the Building Practitioners Board (BPB) if they undertake work directly for a building owner which requires a building permit (all building work in excess of \$5,000). The BPB operates as part of the Building Commission, a state-run regulatory body for the building industry.
Voluntary or Mandatory	Mandatory
Title Held by Business or Individual	Individual; however, any company undertaking building work must have at least one registered building practitioner of the appropriate type as a partner or director.
Number of Years Experience Required	Varies depending on the qualifications of the builder. A domestic builder must have adequate knowledge and experience to carry out, manage or arrange to call out all components of domestic (residential) building work.
Certification Requirements	For registration as a domestic builder (unlimited), a person must have: formal building industry qualification, (i.e., a degree or diploma from a technical college or university, or have passed a course offered by another accredited body, e.g., an industry association) and 3 years of relevant practical experience to the satisfaction of the BPB; <u>or</u> a trade qualification and 5 years (post-qualification) of relevant practical experience to the satisfaction of the BPB; <u>or</u> 10 years of relevant experience to the satisfaction of the BPB. Applications for registration to the BPB include a series of 'self assessment' forms relating to a variety of administrative and technical processes related to building. These provide applicants with an indication of the types of information they are expected to know to obtain registration. To obtain registration, the applicant is required to complete the appropriate guides and conducts an interview to assess the competence of the applicant. The assessors are external consultants who provide recommendations to the BPB regarding the c
Required Memberships	None
Member of Warranty Program?	Yes, all registered domestic builders must provide 3rd party warranty coverage on jobs of \$12,000 or more.
Term of Designation	Registered domestic builder (unlimited)

Number of Courses Required	Varies depending on the relevant experience of the applicant. For applicants with 10 or more years of relevant experience, no courses are required.
Courses	The academic level varies depending on whether the courses are offered as part of a degree or diploma from a technical college or university, or a course offered by another accredited body e.g., an industry association. The following is a list of courses offered by the Housing Authority Association (HIA), one of the industry associations offering such courses: <ol style="list-style-type: none"> 1. Business Planning & Accounting 2. Legal Considerations 3. Estimating 4. Employment Related Issues 5. Occupational Health & Safety 6. Legislation/Licensing/Statutory Compliance 7. Building Codes and Standards 8. Environmental Considerations 9. Building/Construction Technology
Location	Various locations, depending on who is offering the course. Two main types of courses: formal education through technical colleges and universities and courses offered by industry associations (who are accredited bodies for the purposes of demonstrating competence for registration).
Duration of Courses	The full set of courses offered by the HIA includes a total of 205 hours. The duration for each module varies from 1 to 7 hours.
Equivalent Courses	Industry associations and academic institutions each offer courses which are similar in content. To obtain registration, applicants must also demonstrate knowledge in these areas to the Building Practitioners Board.
Testing (type, pass mark)	65%
Teaching Methods	Classroom lecture, projects and assignments.
Course Assessments	
Trainers (number, credentials, etc.)	There is a Registered Training Organization in Victoria which governs the appropriate credentials and experience for trainers.
Recognition of Other Courses	Other training is recognized if appropriate, as per a Recognition of Prior Learning procedure.
Challenging Courses	Yes
PLAR	Yes
Availability of Courses	Offered throughout Victoria
Minimum # of Individuals Required?	15

Cost of Courses	The cost of the full suite of courses is \$1,770 for HIA members and \$2,300 for non-members. Individual courses are available for about \$12 per hour.
Continuing Education Requirements	Not required, but encouraged.
Professional Development Requirements	No, there are various continuing professional development courses available but they are voluntary.
Retention Requirements	
Renewal Requirements	Evidence from insurance company regarding eligibility to obtain coverage is required, but no re-testing for competence.
Renewal Fees	\$180 per year for builders to renew their registration with the Building Practitioners Board.
Grandfathering	Approximately 11,000 builders were grandfathered into the new registration system in Victoria in 1996 to aid the transition from the previous (govt-operated) Housing Guarantee Fund, which acted as a registration and warranty insurance body. There had been some assessment of eligibility for the builders enrolled in the previous scheme, though apparently not as rigorous as the current requirements.
Grace Period	No formal period
Compliance with Code of Ethics	No formal requirement, but activities that would be classed as unprofessional can result in a builder being investigated, charged and suspended or de-registered.

APPENDIX C

Summary of the New Home Builder/Renovator Programs in the United States

Certification Criteria

Province/Region	U.S.A.	U.S.A.	U.S.A.	U.S.A.
Program Name	Certified Graduate Associate (CGA)	Certified Graduate Builder (CGB)	Certified Graduate Remodeler (CGR)	Graduate Master Builder (GMB)
Target Audience	Associate members of the National Association of Home Builders (NAHB).	Custom builders, small volume builders, developers. NAHB members and non-members	Remodelers (licensed and/or insured contractor/remodeler; actively own, operate and/or supervise a remodeling business; and holds a current and valid workers' compensation certificate). NAHB members and non-members	Experienced building professionals. Custom builders, small volume builders, developers
Voluntary or Mandatory Title Held by Business or Individual	Voluntary Individual	Voluntary Individual	Voluntary Individual	Voluntary Individual
Number of Years Experience Required	None	2 years of building industry experience by graduation	Minimum of 5 years remodeling experience	5 years if have previously attained the CGA, CGB or CGR designation; 10 years if have completed 3 CGA, CGB or CGR courses.

<p>Certification Requirements</p>		<p>The designation requires that graduates meet prescribed standards of practice, possess a minimum of 2 years building industry experience, have a proven track record of successful project management, complete a comprehensive education curriculum, and knowledge to uphold the program's code of ethics. Must complete the CGB candidate application then take the Builder Assessment Review (BAR). This 3 hour, 120-question multiple choice assessment measures knowledge and experience in the 4 core areas of building business and project management. The BAR is available at over 600 computer-based testing centres across the country. Administered by LaserGrade. BAR can be administered within 5 working days of contacting LaserGrade. Cost is \$175 per candidate.</p>	<p>The designation requires that graduates meet prescribed standards of business practice, possess a minimum of 5 years remodeling industry experience, have a proven track record of successful project management, complete a comprehensive education curriculum, and pledge to uphold the program's code of ethics. Must complete the CGR candidate application, then take the PREP (Professional Remodelers Experience Profile). This 3 hour, 130 question multiple choice assessment measures knowledge and experience in the 5 core areas of remodeling business management. The PREP is given at major building industry events such as the Remodeler's Show, the International Builders' Show and JLC Live, at state and local home builders associations at over 600 computer-based testing centres across the country. Administered by LaserGrade. Cost is \$175 per candidate.</p>	<p>To be eligible for the GMB designation, candidates must have previously attained the CGA, CGB or CGR designation and have 5 years of building industry experience, or candidates must have completed 3 CGA, CGB or CGR courses and have 10 years building industry experience.</p>
<p>Required Memberships</p>				
<p>Member of Warranty Program?</p>				
<p>Term of Designation</p>	<p>1 year</p>			

Number of Courses Required	6 - 3 required and 3 elective courses	The BAR results determine the number of courses required (0 - 2) from the 4 key areas of the designation curriculum.	The PREP results determine the amount of coursework (0 - 2) in each of the 5 core areas.	5 GMB courses or 4 GMB courses plus 2 CGB/CGR courses.
Courses	<u>Required Courses</u> 1. Introduction to Business Management 2. Customer Service 3. Sales & Marketing or Sales & Marketing for Remodelers & Marketers <u>Elective Courses</u> 1. Builders, Remodelers, & Indoor Air Quality 2. Building Codes & Standards 3. Building Technology: Structures & Exterior Finishes 4. Building Technology: Systems & Interior Finishes 5. Business Accounting & Job Cost 6. Construction Contracts & Law 7. Construction Industry and the ADA 8. Design/Build 9. Energy Efficient Construction 10. Estimating 11. Finance Banking 12. Insurance Reconstruction 13. Land Development, Site Planning & Zoning 14. Negotiating Skills 15. Off-Site Project Management	Building Technology: - Building Codes & Standards - Building Technology: Systems & Interior Finishes - Building Technology: Structures & Exterior Finishes - Indoor Air Quality - Energy Efficient Construction Business Finance: - Business Accounting & Job Costs - Construction Contracts & Law - Estimating - Finance Banking - Introduction to Business Management Project Management: - Design/Build - Off-Site Project Management - On-Site Project Management - Scheduling Sales & Marketing - Customer Service - Land Development, Site Planning	Marketing & Sales - Sales & Marketing for Remodelers - Customer Service Business Administration - Introduction to Business Management - Negotiating Skills - Business Accounting and Job Cost Design, Estimating & Job Cost - Design/Build for Remodelers - Estimating for Builders & Remodelers - Quality Construction Contracts, Liability & Risk Management - Construction Contracts & Law - Negotiating Skills Project Management - Off-site Project Management - On-site Project Management - Scheduling	<u>Required Courses (5 of 6)</u> 1. Land Acquisition & Development Finance 2. Liability & Risk Management for Building Professionals 3. Negotiating Skills 4. Diversification: New Profits for Builders 5. Financial Management 6. Quality Construction

	<p>16. On-Site Project Management 17. Quality Construction 18. Scheduling</p>	<p>& Zoning - Sales & Marketing</p>		
Location	<p>Classes are offered through local and state home builder associations and regional and national trade shows including NAHB's International Builders' Show and the Remodelers' Show.</p>	<p>Classes are offered through local and state home building associations and at national trade shows.</p>	<p>Classes are offered through local and state home building associations and at national trade shows.</p>	<p>Classes are offered through local and state home building associations and at national trade shows including NAHB's International Builders' Show and the Remodeler's Show.</p>
Duration of Courses	<p>36 hours</p>			
Equivalent Courses				<p>Candidates may substitute 2 CGB approved courses for any 1 GMB approved course provided those courses were not used to obtain their</p>

					original CGB/CGR designation.
Testing (type, pass mark)			BAR is a 3 hour, 120 multiple choice assessment. Covers the 4 core areas.		
Teaching Methods					
Course Assessments			BAR	PREP	
Trainers (number, credentials, etc.)					
Recognition of Other Courses					Yes
Challenging Courses			BAR exam	PREP exam	
PLAR			BAR	PREP	
Availability of Courses					
Minimum # of Individuals Required?					
Cost of Courses		Fees are determined by the HBA; National fees are \$175, \$225 non-members	Application fees: \$50 for members; \$100 for non-members. Course fees determined by the HBA. National fees: \$175 for members; \$225 for non-members. Graduation fees: \$145 for members; \$245 for non-members.	Application fees: \$50 for members; \$100 for non-members. PREP fee \$175. Course fees determined by the HBA. National fees: \$175 for members; \$225 for non-members. Graduation fees: \$145 for members; \$145 for non-members.	Fees are determined by the HBA; National fees are \$175, \$225 non-members. Graduation fees: \$145 members; \$245 non-members (for candidates completing the program after Dec 31, 2004)
Continuing Education Requirements		Must complete a total of 12 hours of continuing education every 3 years by attending one full-day NAHB University of Housing course. The additional 6 hours may come from local, state or national trade shows or by earning another professional designation (i.e., CAPS).	Complete 12 hours of continuing education every 3 years. At least 6 hours must be from an NAHB University of Housing course.	Complete 12 hours of continuing education every 3 years. At least 6 hours is earned by attending one full-day NAHB University of Housing course.	Complete 12 hours of continuing education every 3 years. At least 6 hours must be from an NAHB University of Housing course.

Professional Development Requirements	Graduates are required to renew annually and complete a total of 12 hours of continuing education every 3 years.	To maintain the CGB designation, graduates are required to renew annually (\$50 for members, \$75 for non-members) and complete a total of 12 hours of continuing education every 3 years. Six hours of continuing education is earned by attending one full-day NAHB University of Housing course. The additional 6 hours may come from local, state or national trade shows or by earning another designation (i.e., GMB or CAPS)	To maintain the CGR designation, graduates are required to renew annually and complete a total of 12 hours of continuing education every 3 years. Six hours is earned by attending one full-day NAHB University of Housing course. The additional 6 hours may come from local, state or national trade shows or by earning another professional designation (i.e., CAPS).	
Renewal Requirements	Renew annually	Annual renewal fee	Annual renewal fees	
Renewal Fees	\$50 for members; \$75 for non-members	\$50 for members and \$75 for non-members	\$50 for members and \$75 for non-members	None
Grandfathering				
Grace Period				
Compliance with Code of Ethics		Yes	Yes	
Compliance with Building Codes				

APPENDIX D

Summary of the New Home Builder/Renovator Programs in Australia

Certification Criteria

Province/Region	Victoria, Australia
Program Name	Registered Building Practitioners
Target Audience	New home builders and renovators in Victoria must be registered (effectively licensed) by the Building Practitioners Board (BPB) if they undertake work directly for a building owner which requires a building permit (all building work in excess of \$5,000). The BPB operates as part of the Building Commission, a state-run regulatory body for the building industry.
Voluntary or Mandatory	Mandatory
Title Held by Business or Individual	Individual; however, any company undertaking building work must have at least one registered building practitioner of the appropriate type as a partner or director.
Number of Years Experience Required	Varies depending on the qualifications of the builder. A domestic builder must have adequate knowledge and experience to carry out, manage or arrange to call out all components of domestic (residential) building work.

Certification Requirements	For registration as a domestic builder (unlimited), a person must have: formal building industry qualification, (i.e., a degree or diploma from a technical college or university, or have passed a course offered by another accredited body, e.g., an industry association) and 3 years of relevant practical experience to the satisfaction of the BPB; or a trade qualification and 5 years (post-qualification) of relevant practical experience to the satisfaction of the BPB; or 10 years of relevant experience to the satisfaction of the BPB. Applications for registration to the BPB include a series of 'self assessment' forms relating to a variety of administrative and technical processes related to building. These provide applicants with an indication of the types of information they are expected to know to obtain registration. To obtain registration, the applicant is required to complete the appropriate guides and conducts an interview to assess the competence of the applicant. The assessors are external consultants who provide recommendations to the BPB regarding the competence of the applicant to become a registered domestic builder.
Required Memberships	None
Member of Warranty Program?	Yes, all registered domestic builders must provide 3rd party warranty coverage on jobs of \$12,000 or more.
Term of Designation	Registered domestic builder (unlimited)
Number of Courses Required	Varies depending on the relevant experience of the applicant. For applicants with 10 or more years of relevant experience, no courses are required.

Courses	<p>The academic level varies depending on whether the courses are offered as part of a degree or diploma from a technical college or university, or a course offered by another accredited body e.g., an industry association. The following is a list of courses offered by the Housing Authority Association (HIA), one of the industry associations offering such courses:</p> <ol style="list-style-type: none"> 1. Business Planning & Accounting 2. Legal Considerations 3. Estimating 4. Employment Related Issues 5. Occupational Health & Safety 6. Legislation/Licensing/Statutory Compliance 7. Building Codes and Standards 8. Environmental Considerations 9. Building/Construction Technology
Location	<p>Various locations, depending on who is offering the course. Two main types of courses: formal education through technical colleges and universities and courses offered by industry associations (who are accredited bodies for the purposes of demonstrating competence for registration).</p>
Duration of Courses	<p>The full set of courses offered by the HIA includes a total of 205 hours. The duration for each module varies from 1 to 7 hours.</p>
Equivalent Courses	<p>Industry associations and academic institutions each offer courses which are similar in content. To obtain registration, applicants must also demonstrate knowledge in these areas to the Building Practitioners Board.</p>
Testing (type, pass mark)	65%
Teaching Methods	Classroom lecture, projects and assignments.
Course Assessments	
Trainers (number, credentials, etc.)	<p>There is a Registered Training Organization in Victoria which governs the appropriate credentials and experience for trainers.</p>
Recognition of Other Courses	<p>Other training is recognized if appropriate, as per a Recognition of Prior Learning procedure.</p>
Challenging Courses	Yes

PLAR	Yes
Availability of Courses	Offered throughout Victoria
Minimum # of Individuals Required?	15
Cost of Courses	The cost of the full suite of courses is \$1,770 for HIA members and \$2,300 for non-members. Individual courses are available for about \$12 per hour.
Continuing Education Requirements	Not required, but encouraged.
Professional Development Requirements	No, there are various continuing professional development courses available but they are voluntary.
Retention Requirements	
Renewal Requirements	Evidence from insurance company regarding eligibility to obtain coverage is required, but no re-testing for competence.
Renewal Fees	\$180 per year for builders to renew their registration with the Building Practitioners Board.
Grandfathering	Approximately 11,000 builders were grandfathered into the new registration system in Victoria in 1996 to aid the transition from the previous (govt-operated) Housing Guarantee Fund, which acted as a registration and warranty insurance body. There had been some assessment of eligibility for the builders enrolled in the previous scheme, though apparently not as rigorous as the current requirements.
Grace Period	No formal period
Compliance with Code of Ethics	No formal requirement, but activities that would be classed as unprofessional can result in a builder being investigated, charged and suspended or de-registered.
Compliance with Building Codes	If builders are found to have disregarded the building code, they can be charged and suspended or de-registered.

APPENDIX E

Content Areas

Content Area: 1

Business and Operations Plan

The owner/senior manager with the knowledge of this content area would be able to prepare, implement and monitor/evaluate a plan overseeing the business and operations elements of the business.

TASK	Task Description
1.	Establish personal goals
2.	Establishes business goals
3.	Determines scope of services
4.	Determines business approach
20.	Develops a code of ethics to cover all business operations
21.	Develops a land / property acquisition plan
22.	Develops a design and drafting plan
23.	Develops an estimating plan
24.	Develops a contract administration plan
25.	Develops a quality control plan
26.	Develops a customer service program
27.	Develops a waste management plan
31.	Organizes and equips the business office
32.	Develops clear instructions relating to job functions and tasks being delegated
33.	Assesses value of information required to manage business
34.	Uses effective communication skills
35.	Solicits employee input on business operations
36.	Demonstrates leadership
37.	Outlines and communicates goal achievement measures
38.	Ensures that staff is updated and informed about the operations of the business
39.	Obtains appropriate business insurance, licences and permits
40.	Protects the interests of the business
91.	Evaluates whether personal goals are being achieved
92.	Assesses whether a business objectives are being met
93.	Determines if services being offered are appropriate
94.	Assesses the approach to business
107.	Monitors operating performance indicators
108.	Monitors type and frequency of customer complaints
109.	Monitors the effectiveness of problem solving
110.	Develops options for improving business performance
111.	Assesses options and modifies plans
112.	Revises procedures

Content Area: 2
Marketing and Sales

The owner/senior manager with the knowledge of this content area would be able to prepare, implement and monitor/evaluate a plan overseeing the marketing and sales elements of the business.

TASK	Task Description
5.	Determines the general market environment
6.	Determines the target market
7.	Determines where the business should be positioned
8.	Develops a pricing strategy
9.	Develops an original strategy for the marketing activities
10.	Develops a sales strategy for the business
11.	Develops a public relations plan
12.	Determines the marketing tools to be uses
13.	Develops an advertising plan
14.	Develops a client referral plan
41.	Manages the marketing strategy
42.	Manages the advertising plan
43.	Manages the public relations plan
44.	Manages the sales program
45.	Manages the client referral plan
46.	Qualifies the prospect
47.	Assesses prospect expectations and needs
48.	Develops sales and / or exit strategies
49.	Obtains client commitment / contract
89.	Educates customers
90.	Addresses issue of client accountability
95.	Determines why prospects came to the business
96.	Determines why prospects purchased or did not purchase the product
97.	Reviews market situations / realities
98.	Compares monthly sales volume with projected sales volume and determines reasons for variances
99.	Determines sales coming from target market
100.	Determines sales resulting from client referral plan
101.	Determines whether business is positioned as planned

Content Area: 3

Financial Management

The owner/senior manager with the knowledge of this content area would be able to prepare, implement and monitor/evaluate a plan overseeing the financial management elements of the business.

TASK	Task Description
15.	Prepares pro forma income statements
16.	Develops pro forma balance sheet
17.	Prepares cash flow estimates
18.	Develops a long-term financial plan
19.	Determines required mark-ups
50.	Establishes and maintains an accounting system that can be easily related to industry projects
51.	Interprets financial statements and reports
52.	Establishes required financing
53.	Negotiates payment terms with suppliers, subcontractors and developer
54.	Sets up and uses a system to control costs at all levels of the business operations
55.	Sets up system to control cash flow
56.	Establishes and maintains a system for project cost control
57.	Establishes effective purchasing practices
102.	Reviews financial reports
103.	Compares financial reports against budget expectations
104.	Prepares final report on each project
105.	Compares actual margins with expected margins
106.	Evaluates requirements for cash flow and capital Builder's lien

Content Area: 4
Human Resources

The owner/senior manager with the knowledge of this content area would be able to prepare, implement and monitor/evaluate a plan overseeing the human resources elements of the business.

TASK	Task Description
28.	Determines the human resource needs
29.	Prepares job descriptions for all employees
30.	Prepares plans to ensure the business has sufficient skilled human resources
58.	Determines salary, benefits and incentive packages
59.	Adopts effective recruiting practices
60.	Recognizes the strengths and limitations of employees and assigns them work accordingly
61.	Provides clear instructions when assigning tasks
62.	Prepares evaluation criteria for employee performance
63.	Provides skills development and educational upgrading for all employees
113.	Assesses performance of employees
114.	Compares staff salaries with industry / market standards
115.	Determines effectiveness of training initiatives

Content Area: 5
Project Management

The owner/senior manager with the knowledge of this content area would be able to prepare, implement and monitor/evaluate a plan overseeing the office and on-site project management of new home construction or renovation.

TASK	Task Description
64.	Ensures construction conforms to current codes and standards
65.	Keeps up-to-date with new products and building processes
66.	Demonstrates how building components work together as a system
67.	Develops solutions to problems which result from building activities
68.	Performs thorough site investigation, checks on zoning and ensures all required permits are in place
69.	Perform thorough house inspections
70.	Prepares designs, plans and specifications
71.	Estimates accurately all costs of the project
72.	Prepares clear documentation for the bidding and tendering process
73.	Complies with contractual requirements
74.	Prepares clear documentation to ensure an effective bidding and tendering process for subcontractors and suppliers
75.	Prepares contracts to hire subcontractors and suppliers
76.	Plans and schedules the project
77.	Arranges contingency plans to deal with potential problems
78.	Establishes and maintains an effective working relationship with the clients
79.	Addresses and resolves client problems and concerns
80.	Provides after-sales service
81.	Checks plans for errors and omissions
82.	Explains plans and schedules to all site personnel and to the client
83.	Arranges for and acquires all required materials and labour
84.	Performs site inspections to monitor job progress and compliance with plans and specifications
85.	Supervises activities on the site to make certain they are being performed to business standards
86.	Implements procedures for controlling site activity
87.	Enforces safe working conditions
88.	Participates in project cost control

APPENDIX F

Candidate Assessment Review Example

Canadian Graduate Builder (Renovator)

Candidate Assessment Review (CAR)

An example of questions that might be included in the test
(3 of the 5 Content Areas)

Only one answer is to be selected for each question

Marketing and Sales

1. Which statement is correct?
 - A. Marketing focuses on the needs of the seller.
 - B. Marketing focuses on the needs of the buyer.
 - C. A market-driven builder focuses on the product.
 - D. A market-driven builder focuses on customer-oriented decisions.

2. Which of these is an effective strategy for controlling excessive warranty costs?
 - A. Carefully defining warranty standards for buyers
 - B. Setting a ceiling on warranty costs at settlement
 - C. Setting up appointments with suppliers to review warranty standards
 - D. Informing the buyer about warranty costs they are responsible for

3. Which of these is **LEAST** commonly found in a homeowner's manual?
 - A. Steps in the home-buying process
 - B. List of the responsibilities of new homeowners for warranties
 - C. Copy of the building permit
 - D. List of all suppliers and subcontractors

4. Who among these is responsible for disclosure of warranties?
 - A. Buyer
 - B. Seller
 - C. Lender
 - D. Manufacturer

Financial Management

5. Which statement is correct?
- A. Combining several short-term loans into a single long-term loan would most likely reduce loan fees.
 - B. The low fee and high rate loan is preferred over a high fee and low rate loan for short-term residential mortgages.
 - C. The longer the term, the less a loan costs.
 - D. Loan origination fees are calculated as an annual interest rate that increase with the length of the term.
6. Which of these is **LEAST** likely to reduce liability problems for a builder?
- A. Hire an attorney to write a separate contract for each new house.
 - B. Respond to all punchlists and callbacks as quickly as possible.
 - C. Allow time for interruptions or bad weather in all scheduling.
 - D. Review brochures and advertising to eliminate unintended promises.
7. Which of these is best determined from a cash flow statement?
- A. The net worth of the business
 - B. A comparison of sales and revenue to net income
 - C. The sources of income during the last accounting period
 - D. A picture of what occurred financially over a period of time
8. Which statement is correct?
- A. Computerized estimating applications require relevant and accurate data.
 - B. A computerized estimating application does not require the initial input of historical data in order to generate quantity takeoffs.
 - C. Manual estimating never requires as much time as computer-based estimating.
 - D. Computerized-based applications have limited reporting capabilities.
9. Which statement is correct?
- A. Estimating software can be used to interface with accounting.
 - B. In a checklist takeoff system items such as joists or other framing lumber are individually selected to be included in an estimate.
 - C. Both A and B
 - D. Neither A nor B
10. If a customer and builder cannot agree upon a price for a written change

order, which of these is most likely to occur first?

- A. The change order will be completed on a fixed price basis
- B. The agreement between the builder and customer will be terminated
- C. The difference between the price of the change order will be paid by the builder
- D. The difference must be negotiated between the customer and builder before work is continued

Project Management

11. Sealing a house against infiltration may result in which of these?
- A. Increased outdoor airflow through a house
 - B. Reduced outdoor airflow into a house
 - C. Lower humidity levels in a house in the winter
 - D. Higher humidity level in a house in the summer
12. Which statement is correct?
- A. Performance codes describe exactly which methods and materials are to be used in building a house.
 - B. Prescriptive codes generally allow engineering professionals to select the best methods and materials to construct a house.
 - C. Residential dwellings should never include both engineered and conventional building products.
 - D. Stud walls and floor joists are examples of conventional building components.
13. All of these are safety management issues *EXCEPT*:
- A. clean work site.
 - B. liability insurance.
 - C. control of work area.
 - D. ceilings and floors.
14. Which of these is most likely to contain a record of an accident at a job site?
- A. Lead sheet
 - B. Project log
 - C. Communications schedule
 - D. Any of the above
15. Which of these statements accurately describe off-site management?

- A. A pre-construction conference checklist includes job site considerations such as parking, materials storage, temporary utilities and so on.
 - B. A pre-estimate checklist includes job site information such as soil conditions, drainage, lot condition and so on.
 - C. A scope of work describes in detail all tasks to be completed.
 - D. All of the above
16. Which of these should be considered when developing a production schedule?
- A. “Slack time”
 - B. Value engineering
 - C. Door and window schedule
 - D. Loan approval date
17. Which of these schedules is *LEAST* likely to provide information for adjusting tasks to complete a job on time?
- A. A critical path
 - B. A Gantt chart
 - C. A bar chart
 - D. A calendar

CAR Sample Review Answers

- | | | | |
|-----|---|-----|---|
| 1. | D | 11. | B |
| 2. | A | 12. | D |
| 3. | A | 13. | B |
| 4. | B | 14. | B |
| 5. | A | 15. | D |
| 6. | A | 16. | A |
| 7. | C | 17. | B |
| 8. | A | | |
| 9. | C | | |
| 10. | D | | |

APPENDIX G

Residential Construction Superintendent

Residential Construction Superintendent

It is also suggested that a Canadian designation be developed for a Residential Construction Superintendent. The designation could be geared toward potential field superintendents and could benefit current site personnel wishing to excel in their position.

The Residential Construction Superintendent designation should cover the following core competencies:

- General Project Management
- Planning and Scheduling
- Budget Management and Cost Control
- Customer Service and Homeowner Relations
- Safety and Security
- Codes and Quality Control
- Hiring, Training and Supervision
- Office and Subcontractor Relations

The designation courses could be developed in 4-hour modules to allow for maximum flexibility to HBAs administering the designation as well as candidates enrolled in the program. A designation "Residential Construction Superintendent" (RCS) could be issued to candidates that have successfully completed the full set of eight courses.

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