

**NON-MANAGEMENT JOB DESCRIPTION
POINT RATING EVALUATION PLAN**

Working Title Project Assistant		Name	
Position Number	Reports to Position No., Class & Level Senior Manager Zone 1	Division, Branch/Unit Properties Division Property Management Branch/ Project Delivery	Ministry Infrastructure
Present Class Administrative Support 5		Requested Class Administrative Support 5	
Cost Centre			

PURPOSE: Give a brief summary of the job, covering the main responsibilities, the framework within which the job has to operate and the main contribution to the organization (see Non-Management Job Description Writing Guide [Pages 7-8](#)).

As a member of the project management team for the assigned area, the Project Assistant provides complex administrative services essential to the effective and efficient management of the area project portfolio. This position provides administrative support, including contract and financial administration services, for all phases of project management essential to project delivery.

The Project Assistant works closely with the project management team and liaises with contractors, consultants, Ministry representatives, and other project stakeholders when providing project, contract, and financial administration services, resolving associated issues, and responding to enquiries. This position also assists the Project Manager with the preparation of budgets and financial reports for the project portfolio, including monitoring, forecasting and analyzing expenditures and identifying financial issues associated with delivery of projects and management of the project portfolio. Reporting to the Senior Project Manager, the Project Assistant functions within applicable legislation, business plans, policies, guidelines, and standards.

RESPONSIBILITIES AND ACTIVITIES: The purpose of the job can be broken down in different responsibilities and end results. Each end result shows what the job is accountable for, within what framework and what the added value is. Normally a job has 4-8 core end results. For each end result, approximately 3-6 activities should be described (see Writing Guide [Pages 9-10](#)).

1. Project administration services are provided to support the delivery of projects within the area and the management of the area project portfolio.

Activities:

- Initiates and coordinates processes to ensure timely execution of correspondence critical to the management of projects (e.g., letters of award, invitations, security clearances for contractors / consultants / subcontractors, interim and final acceptances, total completions, unsuccessful bid letters associated with field tenders, Contract Approval Summaries, Contract Award Recommendations for approval).
- Retrieves and edits non-technical specification sections from Technical Services and other contract-related documents from the Project Implementation Management System (PIMS).
- Ensures accuracy of copies and collation of contract specifications prior to field tender distribution to contractors.
- Requests Project IDs from Property Management Corporate Services (PMCS) for tracking project costs in the Contract Management System (CMS), Building and Land Information Management Systems (BUMS), and Recommended Action Plan (RAP) project planning program.
- Obtains project plan numbers from the Integrated Contracting and Procurement System (ICAPS) and prepares paperwork for consultants to obtain access to record drawings when required.
- Provides financial information related to project costs to assist Project Manager and/or Facilities Coordinator to complete project documentation in RAP.
- Attends tender openings to record, verify, and witness bids received.
- Prepares documentation, including necessary back-up, for review and approval by Project Manager and Area Director prior to submission to the Departmental Contract Review Committee (CRC).

continued

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- Reviews Procurement award letters for accuracy and advises Project Manager and/or Facilities Coordinator of issues requiring attention; prepares contract distribution listings for Procurement.
- Initiates electronic and hard copy project files for managing project or consultant investigation records in accordance with established Records and Information Management System (RIMS).
- Attends project meetings to record minutes and distribute to stakeholders.
- Prepares and/or reviews Total Project Cost (TPC) increase requests associated with project finalizations and approvals for review and discussion with Project Manager.
- Maintains bring forward system to track project activities and deadlines (e.g., ensure insurance does not expire prior to contract completion date, project warranty inspections are performed in accordance with contract terms, and bond payment releases occur according to established timelines).
- Completes project status update reports for review by Project Manager and/or Facilities Coordinator prior to forwarding to the Area Director.
- Reviews consultant proposals and amendments for accuracy of financial information and seeks clarification from Project Manager, Facilities Coordinator, Facilities Manager, or consultants as required.
- Refers to consultant proposals to summarize scope of services and input information to the Consultant Selection Form (CSF) for review by appropriate manager; releases completed CSF from ICAPS for review and approval in accordance with signing authority matrix.
- Implements procedures to ensure efficient flow of documents within the area project management office, including processing incoming and outgoing mail.

2. Financial administration services are provided to support the delivery of projects and the management of the area project portfolio.

Activities:

- Reviews and interprets contract documents to verify validity of invoices and ensure adherence of contractors and consultants to relevant terms and conditions referenced in consultant agreements or specifications and award letters for contracts.
- Identifies inconsistencies and anomalies pertaining to invoices and resolves issues in consultation with Project Manager, Facilities Coordinator, Facilities Manager, and/or vendors and in accordance with standards and guidelines.
- Ensures invoices are accurate and appropriate back-up included prior to recommending Expenditure Officer (EO) signature authorizing payment.
- Reviews change orders for increases or decreases and ensures material, labour, and equipment allowances for increases accurately reflect entitlements of contractors or subcontractors for overhead and profit in accordance with contract documents.
- Maintains current financial records using contract disbursement tracking systems and project cost summary spreadsheets to ensure payments are reconciled in accordance with contract amounts and commitments and direct payments are within allotted TPC amounts.
- Tracks commitments to ensure funds are available within allotted TPC amounts; identifies potential TPC shortfalls and notifies Project Manager to initiate appropriate documentation for required TPC increase.
- Develops, updates, and administers spreadsheets for multi-year projects, including identifying TPC and costs applicable to current year forecasts.
- Consults with Project Manager and/or Facilities Coordinator on project and consultant investigation forecasts and updates budget forecasts for construction projects and consultant investigations in RAP; identifies forecasting errors in electronic and manual systems, notifies Project Manager, and liaises with PMCS to resolve.
- Prepares transfer vouchers and obtains EO approval for expenditures or financial codes requiring adjustments.
- Ensures current Departmental EO Authority Matrix is followed for all financial activities associated with management of projects.
- Receives, verifies, and processes project and consultant year-end accruals in accordance with the *Financial Administration Act* and department guidelines.
- Ensures Tenant Allowance payment authorization letters to landlords are accurate and entered for reporting purposes.
- Prepares paperwork for any inter-unit transfers funded by other ministries on quarterly basis.

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3. Contract administration services are provided to support the delivery of projects and the management of the area project portfolio.

Activities:

- Prepares and establishes consultant agreements for review and approval by Project Manager, Facilities Manager, or Area Director and forwards to consultants for review and signature; inputs signed agreements into CMS and forwards required documentation to PMCS and/or Finance for review and approval.
- Reviews RAP to obtain funding distribution information for contract input in CMS.
- Inputs field tender contract awards in CMS and provides required back up information to PMCS for review and approval by Finance.
- Verifies accuracy of all contract information in CMS prior to submitting to Finance for approval and to ensure accurate reconciliation and reporting.
- Updates CMS after contracts are awarded through Procurement.
- Verifies contract change orders, cash allowances, and charge orders to ensure accurate back up is provided and prepares documentation for approvals prior to submission to PMCS for review or directly to Finance for approval.
- Completes Cumulative Construction Contract Cost Increase for review and approval by appropriate expenditure authority.
- Prepares and submits vendor maintenance and vendor add requests to PMCS and/or Finance.
- Prepares contractor and consultant contract amendments for contract extensions and/or contract increases, ensuring funding is available within allotted TPC.
- Closes out contracts after completion of consultant services and construction warranty expiration, obtaining EO authority for release of unexpired contract funds as necessary.
- Monitors terms and conditions of Tenant Allowances, ensuring all submittals received throughout contract terms are up to date and funds are available.
- Ensures projects funded by Alberta Infrastructure and other sources are allocated correctly as per chartfields.
- Assists Project Manager with obtaining purchase orders through Service Alberta and IMAGIS.

SCOPE: List specific information that illustrates the challenges, problem solving and creativity requirements and decision making capacity of the position. Also identify the internal or external areas the job impacts (see Writing Guide [Pages 11-12](#)).

The Project Assistant provides project, contract, and financial administration services to facilitate the activities of the area project management team. This position supports delivery of projects that enhance asset value within the area (e.g., major maintenance projects, minor works projects, capital projects, tenant improvement projects, small projects, and consultant investigations) and the management of the area project portfolio.

The Project Assistant works with the Project Manager and/or Facilities Coordinator to follow the Ministry's established project management process by initiating and coordinating administrative functions and preparing critical documents. In addition, this position monitors project management budgets and prepares expenditure forecasts, identifies discrepancies, analyzes variances, prepares project status reports, and updates information in several information systems (e.g., CMS, Facilities and Business Information System - FBIS, RAP, and IMAGIS).

The Project Assistant requires a thorough understanding of administrative functions associated with the project management process, as well as relevant policies, guidelines, and procedures applicable to contract and financial administration. This position independently initiates and completes project, contract, and financial administration services associated with the timely delivery of projects and management of the area project portfolio.

The Project Assistant demonstrates initiative, creativity, and judgement by developing and implementing administrative procedures that improve the operations of the area project management office. This position develops and coordinates administrative and information tracking systems, interprets administrative guidelines in unusual or complex situations, and solves related problems. Work is often performed under the pressure of multiple deadlines and tight timeframes.

The Project Assistant works within the parameters of established policies, regulations, and guidelines. The Project Manager provides general objectives and is consulted for decisions outside established guidelines or situations without clear precedent. The Project Assistant works with minimal direction and applies a pro-active attitude and innovative approach to problem solving to complete work in an accurate and timely fashion. The contributions of this position are

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critical to the effective and efficient management of area projects and the project portfolio, with responsibilities impacting activities of the area project management team, Ministry staff, contractors, consultants, clients, and project stakeholders.

KNOWLEDGE, SKILLS & ABILITIES: Include information on required diplomas and degrees along with identifying the most important knowledge factors, including knowledge about practical procedures, administrative, technical or professional techniques, technical, scientific or program related processes, etc. Detail specific training if there is an occupational certification/registration requirement for the position. Specify the type of experience required for the position (see Writing Guide [Pages 12-14](#)).

In addition to extensive knowledge of policies, regulations, guidelines, and procedures for the delivery of administrative services associated with the project management process (e.g., budget, contract, and financial administration, file management), the Project Assistant requires strong working knowledge of the content and interpretation of relevant sections of contract documents (e.g., Division 00-Procurement and Contracting Requirements and Division 01-General Requirements of the Basic Master Spec) that contains information relating to start-up and close out conditions, change / charge order procedures, insurance and bonding requirements, institutional procedures, payment conditions.

The Project Assistant also requires sound knowledge of:

- Ministry, division and branch mandates, business plans, organizational structure, and reporting relationships
- the area project management office operational plan, structure, services, and linkages to other parts of the Ministry
- basic accounting principles
- the client and stakeholder community affected by the area project management office, branch, and division mandates
- relevant aspects of applicable legislation (e.g., *Financial Administration Act*, *Freedom of Information and Protection of Privacy Act*)
- automated information and business productivity systems used to carry out responsibilities (e.g., Microsoft Office, CMS, FBIS, BLIMS/RAP, ICAPS, and IMAGIS)

The Project Assistant must have demonstrated:

- interpersonal and consultation skills
- verbal and written communication skills
- analytical and problem solving skills
- mathematical aptitude
- organizational and time management skills to prioritize and complete multiple activities, often with tight time pressures
- records management skills
- commitment to confidentiality, tact, diplomacy, and client service

The Project Assistant must be able to:

- respond to changing priorities and critical deadlines
- plan, prioritize, and coordinate varied activities and multi-task in a fast paced environment
- work independently as well as contribute within a team environment
- proactively identify concerns, issues, and potential administrative solutions and recommendations
- demonstrate sound judgement, initiative, attention to detail and accuracy, and creativity

This position requires a high school diploma and at least three years of related administrative / financial experience. Completion of accounting and/or business administration courses is a definite asset.

CONTACTS: Identify the main contacts the position communicates with and the purpose of the communication (see Writing Guide [Pages 14-15](#)).

The work requires a high degree of written and verbal communication and contact with:

- the Project Manager to coordinate administrative aspects of the project management process and ensure efficient operation of the area project management office, including preparing contract documents and related correspondence, attending tender openings, ensuring proper documentation is received and contract conditions are followed, processing invoices, closing contracts, etc.
- contractors to liaise with the Project Manager and/or Facilities Coordinator regarding financial concerns or outstanding issues to ensure execution of services within contract timeframes and rectify invoice irregularities
- consultants to liaise with contractors, Project Manager, and/or Facilities Coordinator regarding financial concerns or

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outstanding issues to ensure execution of services within contract timeframes and rectify invoice or change order / charge order irregularities

- clients to liaise with contractors, Project Manager, and/or Facilities Coordinator when issues or concerns arise during projects and ensure client concerns are directed to the appropriate party.
- representatives of other departments to ensure accuracy of invoices, contracts / agreements, and project correspondence during execution of projects being managed by the area project management office
- Facilities Managers and Facilities Coordinator to liaise with contractors, consultants, and Project Manager to ensure accuracy of invoices, contracts/agreements, and project correspondence during the execution of projects
- Area Director to provide project status and forecast updates
- Area Assistant, Facilities Assistants, other Project Managers, and other Project Assistants to exchange information as to contract procedures or expenditures associated with projects
- Finance and PMCS representatives to resolve discrepancies in payments, invoice processing, etc. to ensure proper allocation of payments to various projects, ensure proper accounting procedures are being followed, and obtain IMAGIS Project IDs
- ICAPS representatives to request Plan Numbers for projects, archived files, and information for contractors / consultants (e.g., blue prints, floor plans) to ensure proper contract specifications are put out to tender