

# 2019 Satisfaction Survey Report

Hold in-person information meetings, particularly outside the major urban centres, and contact local management companies to determine if they will provide notice of the event to the residents of the condominiums they manage and encourage them to attend.

*– Stakeholder survey respondent*

Keep up the good work. Preventing corruption, strengthening integrity, and ensuring compliance benefits the greater good. Thank you.

*– Licensee survey respondent*



## Message from the Chair of the Board

Reliable service, quality product, and efficient delivery—these are ideas that come to mind when thinking about client satisfaction. Though the CMRAO has been officially open for business for less than two years, direct feedback from Ontario’s condominium community is extremely useful to a young organization like ours, even at such an early stage. For that reason, we looked forward to the opportunity to engage with the sector and to learn directly from our key stakeholders the extent to which we were achieving our mandate.



Surveys are good indicators of what people really think about you and offer invaluable insight. They can help to identify, for better or for worse, how a particular business is perceived. Our first survey offered all of this and more.

The responses we received from nearly eight hundred respondents have provided the CMRAO with important takeaways that help us better understand the needs and concerns of the condominium management sector and highlight the areas that require improvement.

We received short answers and very long ones too. There were some well-thought-out responses that were open and extremely honest. All this input is valuable and will help inform the CMRAO’s service delivery, customer service, and future communications activities.

Feedback received from our first survey demonstrates that a good number of things are working well, although there is still a need for refinement in some key areas. We have a strong sense now of how we are viewed within the sector, and the impact we are having on the condo management profession in condo communities across the province. Having said that, we also understand that there is some confusion about our mandate, which means we will have to work harder to articulate and demonstrate the work we do as we move forward to protect Ontario’s condominium consumers.

On behalf of the CMRAO Board of Directors, I would like to thank all the licensed condominium managers, owners, residents, and other stakeholders from across the province’s condominium communities who invested time to share their perspectives with us. The way we move forward in response to what we have heard from the sector will make the CMRAO even more accountable, which is consistent with our mandate and the way we want to operate strategically as a modern regulator.

**Aubrey LeBlanc**

*Chair of the Board*

An improved plan showing a long-term vision for the CMRAO for licensing requirements, costs, and timing would be helpful to ensure that managers and their employers can be better prepared to provide advance training and funding as required to support their employees effectively to avoid undue hardships.

*– Licensee survey respondent*

## About the CMRAO

The Condominium Management Regulatory Authority of Ontario (CMRAO) was created through provincial legislation (*Condominium Management Services Act, 2015*) and began operations on November 1, 2017.

Regulation by the CMRAO means all condo managers and management companies are licensed, meet education and experience requirements, and comply with a code of ethics.

## About the Surveys

As outlined in section 8(6) of the Administrative Agreement, the CMRAO is required to conduct a client-satisfaction survey of all or a sampling of its clients, stakeholders, and licensees at least once every two years beginning no later than one year after designation. Although surveying the condo management sector is a requirement, it is also good practice and helps the CMRAO determine levels of satisfaction and is an important aspect of the CMRAO's role as a modern regulator. Understanding the experiences of our key stakeholders can help us refine and enhance our services and inform our decision making. It also fosters engagement, encourages interaction, and helps us gauge sentiment on the CMRAO's ability to achieve its mandate.

The survey completed by licensed condo managers (Licensee Survey) was distributed via email to approximately 3,200 CMRAO licensees. A second survey was created for condo owners/residents, condo directors, condo lawyers, and industry associations, and was distributed by the Canadian Condominium Institute (CCI) to all Ontario chapters across the province (approximately 3,400 members) by email.

Would like to see statistics on the numbers of complaints received, also shown by region, the average number per registered company, and so on. As much data as possible.

– *Licensee survey respondent*

Very concerned with the huge grey area regarding the code of ethics and interpretation. Very concerned about best practices vs obligations and how that is communicated to management companies. Much, much, MUCH greater clarity is required.

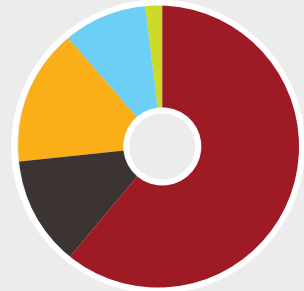
– *Licensee survey respondent*



# About the Licensee Survey Respondents

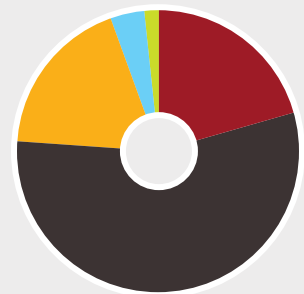
## Regions

Toronto/GTA	61.36%	●
West	12.10%	●
Central	15.29%	●
East	9.34%	●
North	1.91%	●



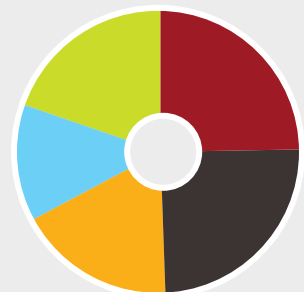
## Age group

18–39	20.64%	●
40–59	55.74%	●
60–69	18.09%	●
70 and over	4.04%	●
I prefer not to say	1.49%	●



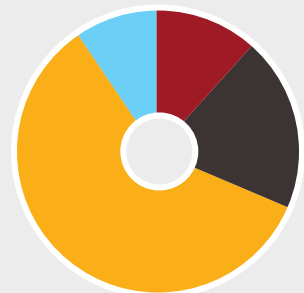
## Level of condo management experience

0–5 years	24.95%	●
6–10 years	24.52%	●
11–15 years	17.97%	●
16–20 years	12.90%	●
Over 21 years	19.66%	●



## Class of licence issued by the CMRAO

Limited Licence	12.87%	●
Transitional General Licence	21.73%	●
General Licence	64.56%	●
Condominium Management Provider Licence	10.13%	●



# What We Learned from the Licensees' Survey

The survey for licensees included three to five questions in each of the following categories: demographics, customer service, licensing process, communications, and delivery of the organization's mandate. There were also options for comments and additional feedback. The survey was completed by 477 people and the response rate was 15%.

## Key Findings

Generally speaking, licensees indicated that they were satisfied with the quality, accuracy, and reliability of the information they received from the CMRAO. They also responded favourably to questions measuring the level of service they received to their phone or email inquiries, and felt their issues were adequately resolved by members of CMRAO's licensing team.

Ninety-six per cent of survey respondents knew the CMRAO accepted complaints against licensees.







The majority of respondents trusted the information they received from the CMRAO. Between 2018 and 2019, survey respondents accessed information from the CMRAO in a number of different ways.

Used the CMRAO website to find information and resources	87.65%
Used the Public Registry to find information about an individual condo manager or a condo management company	35.11%
Downloaded CMRAO materials	51.09%
Reviewed the CMRAO's reports such as the Business Plan and the Annual Report	11.86%
Followed the CMRAO's social media channels to obtain information	14.04%







## Satisfaction with application processing time

In 2018, the CMRAO processed 1,780 new licence applications and managed the renewal of existing licenses as well. The survey results indicate overall satisfaction with CMRAO's application processing time. Overall, respondents thought the online licence application and renewal processes were straightforward.

### My licence application was processed in a reasonable time.

Strongly Disagree	3.32%	
Disagree	8.29%	
Neither Agree or Disagree	13.74%	
Agree	53.55%	
Strongly Agree	20.38%	
N/A	0.71%	






## My renewal application was processed in a reasonable time.

Strongly Disagree	1.42%	
Disagree	3.07%	
Neither Agree or Disagree	11.82%	
Agree	57.21%	
Strongly Agree	22.22%	
N/A	4.26%	

## Communications

Though the CMRAO communicates regularly with registrants, there were several comments expressing a desire for additional materials and new resources, more streamlined access to information on the website, and access to data about the number of licensees and complaints.







### I understand the CMRAO communications I receive (e.g., renewal reminders, updates about licensing processes, e-blasts, etc.).

Strongly Disagree	0.93%	
Disagree	3.26%	
Neither Agree or Disagree	8.84%	
Agree	62.56%	
Strongly Agree	24.42%	

## General awareness

We also measured awareness of CMRAO's mandate and whether condo managers understood the requirements to become licensed by the CMRAO.






### I understand the requirements to become a licensed condo manager.

Strongly Disagree	0.95%	
Disagree	2.61%	
Neither Agree or Disagree	2.61%	
Agree	60.10%	
Strongly Agree	33.25%	
N/A	0.48%	






## Impact and value for the profession

For the most part, CMRAO licensees responded favourably to customer-service questions, as well as questions about the quality of information and resources available to them. An area for improvement for the CMRAO, based on the responses we received, has to do with licensees' perception of the CMRAO. More specifically, what licensees perceive as the value the CMRAO brings to the table.

### The CMRAO promotes professional standards, ethics, and best practices.

Strongly Disagree	2.39%	
Disagree	3.83%	
Neither Agree or Disagree	25.60%	
Agree	57.89%	
Strongly Agree	10.29%	

### I believe the CMRAO is meeting its mandate.

Strongly Disagree	3.11%	
Disagree	9.33%	
Neither Agree or Disagree	40.19%	
Agree	42.82%	
Strongly Agree	4.55%	

Licensees provided us with honest feedback that we are taking seriously. Prior to mandatory licensing, which began on November 1, 2017, anyone could provide condo management services. Today, condominium managers are licensed professionals who need a licence to legally provide condo management services in Ontario. The CMRAO will demonstrate more clearly what we do to meet our mandate to licensees and to the public in general. As a modern regulator, the CMRAO uses data to effectively inform our approach to regulatory activities and reduce the burden for licensees. Moving forward, we will present more of our data in a format that is relatable and easy to understand in an effort to better articulate what we do, and to better explain the multifaceted nature of our mandate.



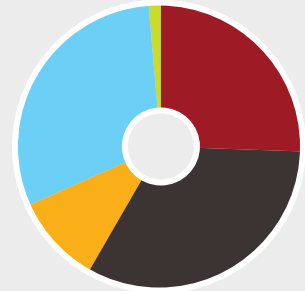
We understand that the CMRAO protects condominium owners, but it has to set rules of the game for the protection of both parties: Condominium Owners and Licensees. This way, the condominium life and industry would be very well balanced.

*– Licensee survey respondent*

# About the Stakeholder Survey Respondents

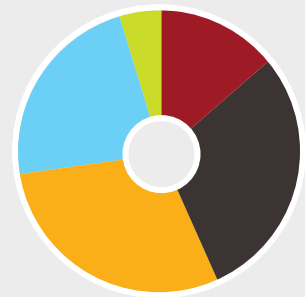
## Regions

Toronto/GTA	25.65%	●
West	32.79%	●
Central	10.06%	●
East	30.19%	●
North	1.30%	●



## Age group

18–39	13.64%	●
40–59	29.87%	●
60–69	29.55%	●
70 and over	22.40%	●
I prefer not to say	4.55%	●



## Role in condo sector

Condo unit owner	61.49%	■
Condo board director	42.72%	■
Member of an industry association	18.12%	■
Condo lawyer	2.91%	■
Other (please specify)	21.68%	■
Tenant in a condo unit	0.65%	■

In plain language, what value does the CMRAO provide to a condo unit owner? I see that I can voice a complaint, and that there is licensing; however, why does this exist? Does the CMRAO maintain a minimum quality of condo management? If so, what is that minimum quality?

– Stakeholder survey respondent



## What We Learned from the Stakeholders' Survey

The survey for stakeholders asked from three to five questions in each of the following areas: demographics, awareness of the CMRAO, and communications/resources. There were also several open-ended questions where respondents could add their own comments. The survey was completed by 311 people and the response rate was 9%.

### Key Findings

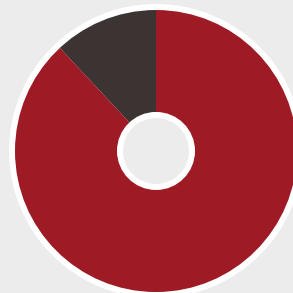
Responses indicate strong knowledge that complaints can be filed with the CMRAO against our licensees (82%), though not as many respondents were aware of CMRAO's Public Registry (62%). Only 21% of the stakeholders surveyed had ever used the CMRAO's Public Registry.

### Public awareness

Most stakeholders who responded to the survey were aware of the CMRAO and offered feedback about what the CMRAO could do to further increase our awareness.

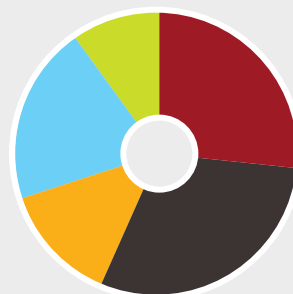
#### Prior to this survey, were you aware of the CMRAO?

Yes	88.26%	●
No	11.74%	●



#### What can the CMRAO do to increase public awareness?

Advertise in print and online media	51.01%	●
Provide free educational material	57.09%	●
Hold public consultations	25.91%	●
Hold information webinars	37.65%	●
Other (please elaborate below)	19.03%	●



Our condo corporation is self-managed, so the CMRAO is not as applicable to us, but I am aware of friends who are owners in condominiums where the manager is not licensed, and the condo corporation has not yet been registered. I would like to see more aggressive follow-up on corporations where managers are not registered—start there.

– Stakeholder survey respondent

## Communications

Broadly speaking, stakeholders who had the opportunity to visit the CMRAO website viewed and downloaded content and used the Public Registry to search our database of licensed condominium managers. However, some of the comments we received in open-ended questions suggest many people who visited [www.cmrao.ca](http://www.cmrao.ca) experienced difficulty navigating the site and finding the information they were looking for. We already have plans in motion to streamline the content on our website, which should make it easier to access information about licensing, and about Ontario's condominium management sector.

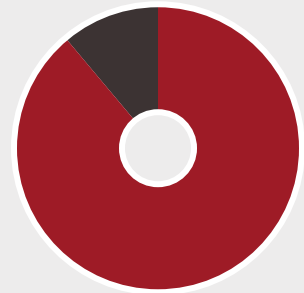
Used the CMRAO website to find information and resources	53.16%
Used the Public Registry to find information about an individual condo manager or a condo management company	20.68%
Downloaded CMRAO materials	31.65%
Reviewed reports such as the Business Plan and the Annual Report	10.97%
Followed the CMRAO's social media channels to obtain information	10.55%
Other (please specify)	29.96%

## Impact and value

The survey revealed that among stakeholders, there is some confusion around the role of the CMRAO and the Condominium Authority of Ontario (CAO). There were several comments about accessing director training and having access to forms, neither of which the CMRAO provides. The mandate of the CAO is to improve condominium living by providing services and resources for condo owners, residents, and directors, whereas the mandate of the CMRAO is to protect condominium consumers in Ontario by regulating and providing oversight of condominium managers and management companies.

### Did you know that condo managers are required to be licensed by the CMRAO in order to provide condo management services?

Yes	88.89%	●
No	11.11%	●



## Action Plan

The feedback we received from our licensees and stakeholders gave us some clear insight into what the CMRAO is doing well, and where it can make some changes so that information is clearer and easier to access, with the ultimate aim of improving our services to this regulated sector.

The following list shows what we are working on as we move forward:

- Providing more resources
- Revising and streamlining content so the website is easier to navigate
- Expanding outreach to stakeholders
- Providing more information to the sector
- Developing more resources to help the sector better understand the roles and responsibilities of licensed condominium managers
- Creating an advisory committee to provide direct input to the CMRAO Board of Directors on issues of importance to condo consumers
- Publishing more information about the complaints process and how complaints are handled

Our thanks to everyone who took the time to complete a satisfaction survey. The CMRAO values the feedback we received from the condominium management sector. Your responses will shape the delivery of our services moving forward and will help us meet common and shared goals across the sector.



## Licensing Fees

We received a number of comments related to licensing fees from this survey. Most people felt they were too high, and some wondered why the sector was regulated in the first place.

The CMRAO issues licenses and charges licensing fees to meet its consumer protection mandate, and to recover the regulatory costs associated with the administration of the *Condominium Management Services Act, 2015* (CMSA). The CMRAO's licensing fees were set in 2017 following public consultation with stakeholders representing the condominium management sector. All condominium managers and management companies providing condo management services in Ontario need a licence from the CMRAO.

Licensing fees cover the cost of operations and help the CMRAO regulate the condominium management sector. These costs include processing licence applications, enforcement and compliance activities (including inspections and investigations), handling complaints, discipline and appeals hearings, and public awareness activities. In April 2019, the CMRAO was pleased to announce that licensing fees would be reduced by 6.6% for the 2019–20 licensing year.



Condominium Management  
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