

# Report on the Competency Profile for Condominium Managers in Ontario 2019

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Condominium Management  
Regulatory Authority of Ontario

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## Contents

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Message from the Chief Executive Officer and Registrar .....	2
Acknowledgements .....	3
Methodological Report.....	4
Background .....	5
Timelines .....	6
Methodology.....	7
Research Phase .....	7
Development Phase.....	7
Advisory Committee .....	8
Subject Matter Experts (SMEs) .....	9
Overview .....	10
Refinement Phase .....	11
Online Survey.....	11
Survey Results .....	11
Survey Sample .....	12
Final Competency Profile.....	13
Competency Profile for Condominium Managers.....	14
Glossary of Terms .....	22

## Message from the Chief Executive Officer and Registrar

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Effective November 1, 2021, the authority for setting education requirements will be transferred from the Minister of Government and Consumer Services to the Registrar of the CMRAO.

In 2019, the CMRAO began its preparation for this transition and underwent a procurement process that selected Johnson & Johnson as the consultants to develop a competency profile that defines the condominium management profession in Ontario.

The quality and comprehensiveness of the new competency profile can be attributed to the knowledge and efforts of the CMRAO Advisory Committee, and the group of subject matter experts (SMEs) that was established, which consisted of highly experienced condominium managers from across the province, as well as individuals who came from a teaching/training background.

The competency profile is an important milestone for the province's condominium management profession. Having said that, the profile is only a snapshot of the condominium management sector as things stand today and will need to be reviewed and updated periodically. Underpinning the entire process will be continual consultation and feedback from the rapidly expanding sector.

The CMRAO has recently begun the next phase of the process to develop a course curriculum and blueprint based on the competency profile. This information will be released once the components are completed.

The consultants noted that this was a particularly high rate of participation from the sector, and on behalf of the CMRAO I would like to thank all licensees who took the time to complete the survey for their engagement and support of this project.

I look forward to discussing the competency profile and sharing the progress of the new project with licensees and stakeholders.

**Ali Arlani**

Chief Executive Officer and Registrar

## Acknowledgements

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The newly developed condominium manager competency profile could not have been realized without the significant contributions of a number of individuals.

First, the CMRAO acknowledges the work of the eight Subject Matter Experts (SMEs) who were instrumental in developing the detailed and relevant content:

- Anne Burgoon
- John Damaren
- Nadia Freeman
- Chuck Garneau
- Yasmeen Nurmohamed
- Shelley Seaby
- Janice Schenk
- Sean Wilde

The CMRAO also recognizes the contributions of the Advisory Committee whose feedback was extremely instructive and greatly informed the entire process:

- Helen Ash
- Juliet Atha
- Marilyn Bird
- Kathryn Cairns
- Debbie Dale
- Christine Dingemans
- Josée Deslongchamps
- Carla Guthrie
- Tania Haluk
- Antony Irwin
- Chris Jaglowitz
- Raj Malik
- Kevin McCarthy
- Craig McMillan
- Mike Mullen
- Jim O'Neill
- Mohammad Pathan
- Kristi Sargeant-Kerr
- Mark Steinman
- Kathleen Stephenson

Finally, the CMRAO acknowledges and thanks the 513 condominium managers who took the time to complete the online survey. The input provided through the survey helped to ensure that the final report prepared by the consultants was grounded in the realities of day-to-day condominium management across the province.

# Methodological Report

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## Background

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The following describes the process undertaken to develop a new competency profile for the Condominium Management Regulatory Authority of Ontario (CMRAO) intended for condominium managers applying for a General Licence.

One of the key drivers of this particular initiative is the upcoming requirement (November 2021) announced by the Government of Ontario that the learning outcomes for educational programs be defined and specified by the CMRAO. Although the immediate purpose of the competency profile will likely be related to the development, review, and approval of educational programs, a number of other future potential uses exist:

- Providing advice/guidance to members
- Developing standards and policies
- Informing matters related to professional conduct
- Assessing applicants for entry and/or re-entry into the profession
- To inform continuing education requirements

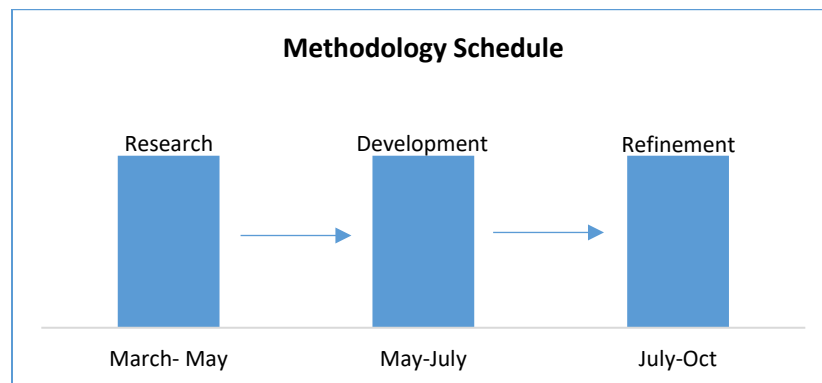
The deliverables associated with this project include:

- Execution of a focused literature review
- Management of a team of Subject Matter Experts to develop a draft competency profile
- Ongoing reporting to CMRAO and consultations with the Advisory Committee
- Administration of an online survey aimed at validating and informing changes to the finalized competency profile
- Preparation of a finalized competency profile (structured per specific domains) and accompanying methodological report

This report sets out the methodology used to develop the competency profile for new General Licence holders. The process was divided into three main phases consisting of:

- i) consultation,
- ii) development, and
- iii) refinement.

The entire process took nine (9) months to complete, running from March to November 2019.



## Timelines

An evidence-based approach was employed to develop the competency profile. An initial review of salient literature and key informant interviews was followed by consultations with a multidisciplinary Advisory Committee and team Subject Matter Experts. An online survey of all CMRAO licensees was also undertaken to validate the draft competencies and inform a final set of changes. The entire initiative took eight (8) months to complete; a summary of the major project activities as associated timing is provided below.

Timing	Activity	Responsibilities
March 26, 2019	Finalize contract	Consultants & CMRAO
April, 2019	Develop Terms of Reference for the Advisory Group and Subject Matter Experts	Consultants
April, 2019	Key informant interviews	Consultants
April, 2019	Preparation of project plan	Consultants
April, 2019	Recruitment of 8 Subject Matter Experts	CMRAO
May 2, 2019	Initial face-to-face meeting with the Advisory Group (0.5 days)	Consultants & Advisory Committee
April 2019	Key literature sources identified	Consultants & CMRAO
April–May, 2019	Literature review	Consultants
May 22–23, 2019	First meeting of the Subject Matter Experts (in-person 2.0 days)	Consultants & SMEs
July 10–11, 2019	Second meeting of the Subject Matter Experts (in-person 2.0 days)	Consultants & SMEs
August 8, 2019	Second meeting of the Advisory Group (0.5 days)	Consultants & Advisory Committee
August 23–30, 2019	Survey development and testing	Consultants, SMEs, & Advisory Committee
September 5–26, 2019	Survey of all ON registrants	Consultants
October, 2019	Analysis of survey data	Consultants
October 18, 2019	Third meeting of the Subject Matter Experts – review survey findings and make final adjustment to competencies (1.0 day)	Consultants & SMEs
October, 2019	Preparation of finalized competency profile and methodological report	Consultants

## Methodology

### Research Phase

At the outset, the consultants conducted a focused literature review to define the roles and responsibilities of condominium managers and source language and references appropriate for the development of professional competencies. The Advisory Committee was asked to submit salient documents to the consultants for review and analysis. Major sources of information included: educational information; course syllabi, developed by the Association of Condominium Managers of Ontario (ACMO); regulatory standards; relevant pieces of provincial legislation; and a summary of recent complaints made to the CMRAO.

Consultants completed four (4) key informant interviews to supplement the information gathered in the literature review (see table below).

Name	Role	Interview Date
Tania Haluk	President, CCI, Toronto	April 16, 2019
Janice Schenk	Director of Education, ACMO	April 17, 2019
Murray Johnson	Vice President, Client Operations, Crossbridge Condominium Services	April 22, 2019
David Duncan	President, Deerpark Management Limited	May 3, 2019

### Development Phase

At the outset of the development phase, a definition of a “competency statement” was created. Competency statements in this context, are intended to describe a capability to apply or use a set of related knowledge, skills, and abilities required to successfully perform critical work functions or tasks in a defined work setting. A few guiding principles were employed in the construction of all competencies:

- The performance of the competency must be observable
- Demonstration of the competency must be measurable and based on individual performance

An iterative approach to develop a definition in this regard was employed. A set of three potential definitions drafted by consultants were proffered (please see below). Advisory Committee members were asked to offer their opinions and preferences via an online survey (see *Figure 1*).

1. *“An observable ability of a condominium manager at the point of qualifying for a General Licence that integrates the knowledge, skills, and judgment required to **manage responsibly in accordance with applicable legislation.**”*
2. *“An observable ability of a condominium manager at the point of qualifying for a General Licence that integrates the knowledge, skills, and judgment required to **protect the condominium corporation and its assets.**”*
3. *“An observable ability of condominium manager at the point of qualifying for a General Licence that integrates the knowledge, skills, and judgment required to **provide condominium management services in an ethical, diligent, and responsible manner.**”*



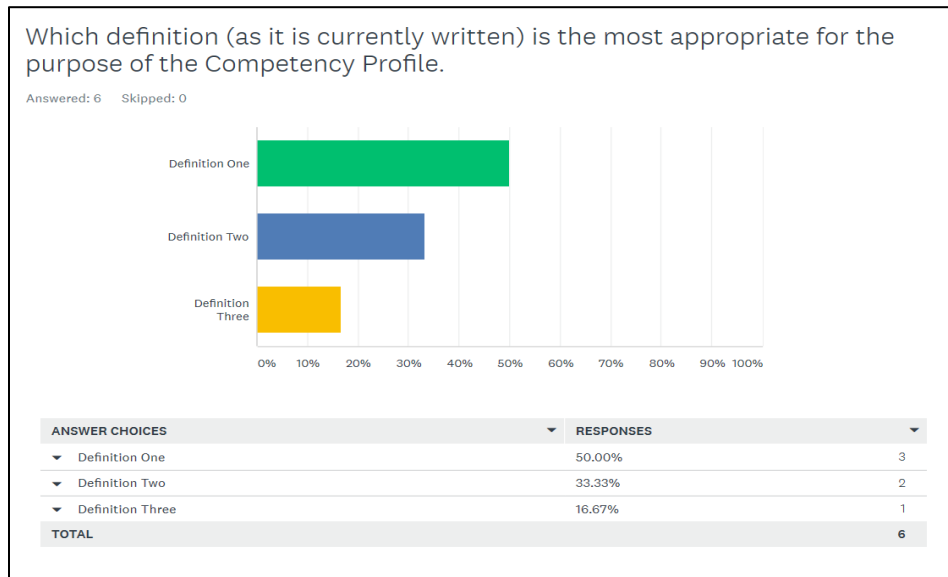


Figure 1. Survey Results on Competency Statement (Advisory Committee)

The input and feedback from the SME group was requested as well. Ultimately, a hybrid definition was adopted and used to guide the development of professional competencies specific to general-livance condominium managers with the CMRAO:

***“An observable ability of a condominium manager at the point of qualifying for a General Licence that integrates the knowledge, skills, and judgment required to manage and protect the condominium corporation and its assets in accordance with applicable legislation.”***

This definition is critical, as it helps to set the parameters of the competency profile and the level of proficiency that an individual seeking a General Licence is expected to demonstrate.

## Advisory Committee

Day-to-day oversight of the project was managed by senior staff at the CMRAO. Overall guidance, input, and support were provided by a multidisciplinary Advisory Committee. This group met twice in person at the CMRAO offices on May 2 and August 9, 2019. Major activities undertaken by the Committee included:

- Providing input into the scope and purpose of the competency profile
- Developing a definition of competency suitable to newly licensed GLs
- Reviewing and editing draft competencies developed by the SME team
- Refining and testing of the online validation survey

Advisory Committee members were also asked to opine on what they felt to be the main purpose(s) of the competency profile. Common themes are as follows:

- Educate public and other key stakeholder groups
- Elevate the status of the profession
- Identify skills and knowledge required to provide condominium management services responsibly, prudently, ethically, and diligently
- Promote standardization and quality
- Enhance the quality and consistency of education
- Provide clarity for potential condominium managers, Condominium Authority of Ontario (CAO), and other related stakeholders

## Subject Matter Experts (SMEs)

A team of eight (8) Subject Matter Experts (SMEs) were responsible for developing competencies based on the information collected in the research phase. SMEs were recruited by the CMRAO. Terms of Reference were developed to guide the efforts of the group.

The composition of the SME team is set out in the table below.

<b>Subject Matter Expert</b>	<b>Years of Experience</b>	<b>Region</b>
Anne Burgoon	12	Eastern Ontario
Chuck Garneau	13	Markham/Richmond Hill
Janice Schenk	11	n/a
John Damaren	28	GTA
Nadia Freeman	34	Ottawa
Sean Wilde	17	Waterloo
Shelley Seaby	13	Ottawa
Yasmeen Nurmohamed	25	GTA

Subject Matter Experts were joined by CMRAO senior staff in the development and refinement phase. These individuals included Sandy Vizely, Mary Lou Gignac, and Angela Kapassouris.

## Overview

The collective findings from the literature review, CMRAO complaints' data, key informant interviews, and initial Advisory Committee meeting guided the process of competency profile development. The SME group met twice for a face-to-face meeting in May to develop a rough draft of competency profile's structure and headings including the first of set of competencies. Verb levels and choices were greatly informed by Bloom's Taxonomy<sup>1</sup> (see *Figure 2*) and Miller's Pyramid<sup>2</sup> in order to ensure that competencies were observable and at a level of proficiency that could be expected of a new GL holder. As such, verbs between Bloom's level 2 and level 5 were selected.

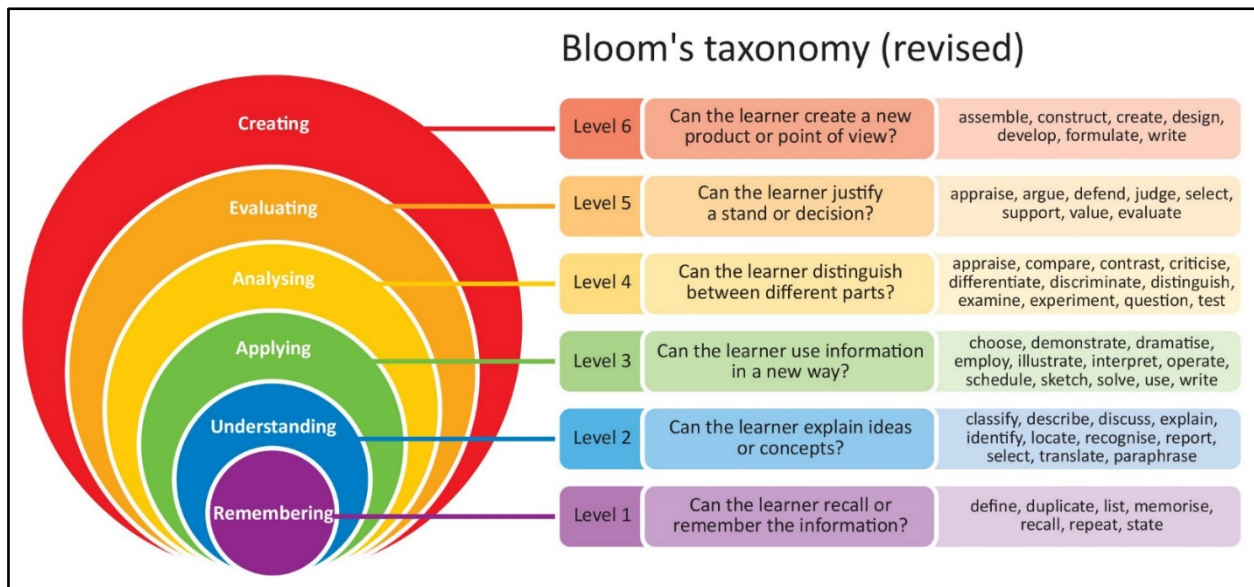


Figure 2. Bloom's Taxonomy

Inter-meeting homework was assigned to all SMEs; each was asked to draft competencies relevant to a specific heading.

An initial draft of the competency profile was circulated in advance of the second SME meeting in July. This first version included 110 competencies across 3 domains and 10 headings. Revisions and edits were guided by the following rubric:

- Does the competency need to be there at all?
- Is it clear? Does it need to be edited?
- Is the appropriate verb used (Bloom's Taxonomy)?
- Is the concept repeated; i.e., in more than one place?
- Is this an important regulatory concern?
- Is this document the right place to address this issue?
- Is this an entry-level competency?

Inter-meeting homework was assigned to all SMEs; each was asked to draft three or four glossary terms.

The draft Profile was presented at the Advisory Committee meeting in August. Members were asked to review the Profile and provide feedback on competencies before being put out to survey. Edits in plenary and break-out groups were made to 14 competencies. Additionally, the "Financial"

<sup>1</sup> B. Bloom, *Taxonomy of Educational Objectives, Handbook I: The Cognitive Domain* (1956).

<sup>2</sup> G. Miller, *The Assessment of Clinical Skills/Competence/Performance* (1990).

section was substantially reworked. The competency profile was finalized to 81 competencies, three domains, and nine headings.

The methodology associated with the construction and distribution of the survey was reviewed by the Advisory Committee. It was suggested that the respondents should be surveyed with four demographics questions. The Advisory Committee determined that two separate questions would be asked for each competency: one related to importance, and the other to level of proficiency.

## Refinement Phase

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### Online Survey

An online practice survey with practising condominium managers was circulated as part of the validation process. The purpose of the survey was to determine the extent to which the draft competencies resonated with practising condominium managers from across the province and determine if any additional competencies should be drafted before finalizing the document.

A “census style” approach was implemented whereby all active, registered condominium managers across Ontario were sent an invitation and link to the survey by CMRAO. In addition, respondents were able to access the entire document and glossary as reference while they completed the survey.

The survey, which was active for three weeks, was tested and launched per the activities and timelines set out below (all dates 2019).

TIMING	ACTIVITY
August 8	Advisory Committee meeting to review competency profile
August 12–23	Finalize competency profile (Advisory Committee and SME input)
August 27–30	Survey testing by the Advisory Committee and SMEs
September 4	Survey finalized
September 2–4	CMRAO prepare and customize invitations
September 5	Survey invitation sent by CMRAO
September 19	Reminder email sent by CMRAO
September 26	Survey closes

## Survey Results

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A total of 513 complete and partially complete responses were received. Individual responses for each competency ranged from a low of 275 to a high of 297 for questions related to importance and 173 to 256 for level of proficiency.

The survey was designed to gather opinions from licensed condominium managers on whether the draft competencies presented are reasonable expectations from a General Licence condominium manager at a time of initial licensure. Two questions on each of the 81 competencies were asked in support of this research goal:

1. Rate the importance of this competency for a new General Licence holder. (Likert Scale: “1-Not Important,” “2-Somewhat Important,” “3-Important,” “4-Very Important”).

2. For a new General Licence holder, is this competence (“1-Too Easy,” “2-About Right,” “3-Too Hard”)?

As a means of determining which competency may require further discussion among the SME group, the following rubric was employed:

1. Any competency that received less than an 80% result of “Important” plus “Very Important.”
2. Any competency that received either a “1-Too Easy” or “3-Too Hard” result that was greater than 20% was flagged for discussion.

Based on this approach, a total of 24 competencies were flagged for further discussion.

A cross-tabulation of respondents identifying themselves as General Licensee holders has also been provided.

## Survey Sample

As described above, the survey was a “census-style” instrument sent to all licence holders in Ontario. No sampling was performed. Comparison with all current licensees provides an estimate of the relative “representativeness” of the respondent pool. The following chart provides details across three key demographics in the regard.

### Type of Licence

	All Licensees (N = 3,498)	Survey Respondents (513)
<b>General</b>	47.2%	60.1%
<b>Limited</b>	30.2%	19.8%
<b>Transitional</b>	22.6%	19.1%

### Licence by Region

	All Licensees (N = 3,477)	Survey Respondents (513)
<b>Eastern Ontario</b>	8.3%	10.5%
<b>Toronto/GTA</b>	35.0%	54.6%
<b>Western Ontario</b>	8.9%	13.8%
<b>Central Ontario</b>	46.7%	19.3%
<b>Northern Ontario</b>	1.2%	1.8%

### Employer

	All Licensees (N = 3,498)	Survey Respondents (513)
<b>Management company</b>	90.0%	94.0%
<b>Directly through a condo corporation</b>	10.0%	6.0%

The overall response rate of the survey was excellent as compared with similar research instruments used with other regulated professions: 513 responses of a total pool of 3,498 equates to 13%. This results in a +/- 4% margin of error at a 95% confidence level.

Note that some regional variation is evident in the respondent pool relative to the entire population of licensees; some over representation in the GTA is apparent. This is likely due to some individual reporting the location of their employers' "head office" rather than the location of the facility they manage and some small discrepancies in wording used in the survey relative to CMRAO standard definitions.

## Final Competency Profile

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Comments and flagged competencies were individually discussed by the SME group at a face-to-face meeting on October 18, 2019. Based on deliberations, flagged competencies were either kept as-is, reworked, or removed to improve overall clarity. In addition, all comments have been reviewed, and where appropriate, incorporated into applicable competencies.

The finalized version consists of a total of 79 competencies grouped thematically under three domains and nine headings:

- A. Foundational
  - 1. Interpersonal
  - 2. Communication
  
- B. Management
  - 3. Physical Building
  - 4. Operations
  - 5. Legal
  - 6. Financial
  - 7. Information
  
- C. Professional
  - 8. Ethics
  - 9. Professional Development

# Competency Profile for Condominium Managers

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# Competency Profile for Condominium Managers in Ontario

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## Background

The Condominium Management Regulatory Authority of Ontario (CMRAO) is a non-profit corporation established in November 2017 by the Government of Ontario as part of the *Protecting Condominium Owners Act, 2015*. It works in the public interest to license and regulate condominium management professionals and condominium management providers (i.e., businesses). CMRAO is accountable for public protection by ensuring condominium managers and management firms in Ontario practise safely, competently, and ethically. CMRAO fulfills its mandate through a variety of regulatory activities, including licensing, maintaining standards of condominium management practise and education, enforcing condominium management standards, conducting continuing competence reviews, and establishing competencies required for condominium property management practice.

This competency profile describes the minimum expectations (i.e., professional competencies) of an individual applying for a General Licence with the CMRAO. These expectations are defined as *“an observable ability of a condominium manager at the point of qualifying for a General Licence that integrates the knowledge, skills, and judgment required to manage and protect the condominium corporation and its assets in accordance with applicable legislation.”*

The competency profile is used for many purposes, including but not limited to:

- Academic program approval/recognition
- Providing advice/guidance to members
- Developing standards and policies
- Informing matters related to professional conduct
- Assessing applicants for entry and/or re-entry into the profession
- To inform continuing education requirements

## Development

A robust methodology based on industry best practices was used to develop the competency profile. A team of ten Subject Matter Experts (condominium managers, regulators, and educators) drawn from across the province worked over a six-month period to generate associated content. Input gathered from a series of interviews with key stakeholders and salient literature was also incorporated. The draft set of competencies was then validated via an online survey of condominium managers currently licensed with the CMRAO.

## The Context of New General Licence Condominium Managers

The design and application of the listed competencies is at the point of application for general licensure, following graduation of a recognized education program and two or more years (2,920 hours) of condominium management services' practicum. A General Licensee (GL) is a licensed individual who handles the day-to-day operations of condominiums under the direction of condominium corporations. They are hired directly by a condominium corporation or provide services through a condominium management provider. They recognize their limitations, ask questions, exercise professional judgment, and determine when they require consultation. They realize the importance of identifying what they



know and do not know, what their learning gaps may be, and how and where to access available resources. They display initiative, confidence, and self-awareness in taking responsibility for their decisions and actions.

### Overarching Principles

These competencies are expected not only at the point of initial GL licensure; all General Licensees are ultimately accountable to meet these competencies throughout their careers. The following overarching principles apply to the education and practice of General Licensees:

1. New GLs are expected to be able to address commonly occurring workplace situations without supervision or direction within a reasonable timeframe and seek guidance when they encounter situations outside of their ability. It is unrealistic to expect a new GL to function at the level of practice of an experienced GL.
2. New GLs have a strong foundation in physical building management, condominium law, financial management, administration, and human relations acquired from a recognized education program.
3. New GLs practise autonomously within the bounds of relevant legislation and regulatory standards, including the Code of Ethics.

### Structure

There are 79 competencies grouped thematically under three domains and nine headings:

Foundational:	Management:	Professional:
<ol style="list-style-type: none"> <li>1. Interpersonal</li> <li>2. Communication</li> </ol>	<ol style="list-style-type: none"> <li>3. Physical Building</li> <li>4. Operations</li> <li>5. Legal</li> <li>6. Financial</li> <li>7. Information</li> </ol>	<ol style="list-style-type: none"> <li>8. Ethics</li> <li>9. Professional Development</li> </ol>

Underlined terms are defined in the Glossary.

## Ontario Condominium Manager Competencies

### A. Foundational

Professional condominium managers have a strong foundation in building and maintaining relationships with stakeholders using effective communication strategies and critical thinking to enhance condominium communities.

Subheading	Competency
<b>Interpersonal</b>	1.1 Engage in collaboration and teamwork in the delivery of management services.
	1.2 Manage time and workload to meet the contractual obligations of the condominium management agreement.
	1.3 Apply sound and practical judgment in daily matters.
	1.4 Apply strategies to resolve conflict.
	1.5 Identify the need for and employ strategies to maintain personal well-being.
	1.6 Demonstrate a <a href="#">professional presence</a> .
	1.7 Demonstrate respect for rights, dignity, and diversity.
	1.8 Manage expectations in an empathetic manner.
<b>Communication</b>	2.1 Adapt communication strategies to suit different audiences.
	2.2 Develop and maintain professional relationships in the delivery of management services.
	2.3 Communicate clearly and concisely orally and in writing.
	2.4 Engage in <a href="#">active listening</a> .
	2.5 Facilitate communication by demonstrating common courtesy and consideration in professional interactions.
	2.6 Maintain privacy and confidentiality involving condominium corporation matters as per legislation.

## B. Management

Professional condominium managers are responsible for the effective operations of the condominium corporation within the legal framework. They protect financial and physical assets to ensure the property is well managed.

Subheading	Competency
<b>Physical Building</b>	3.1 Apply knowledge of <a href="#">building systems</a> in the management of <a href="#">properties</a> .
	3.2 Conduct general inspections of the <a href="#">property</a> to identify maintenance and repair requirements.
	3.3 Manage inspections, testing, maintenance, repair, and replacement obligations of the condominium corporation.
	3.4 Explain the requirements and process of the <a href="#">Reserve Fund Study</a> .
	3.5 Assist in the development and implementation of the <a href="#">Reserve Fund Study</a> .
	3.6 Explain the requirements and process of the <a href="#">Performance Audit</a> .
	3.7 Explain the warranty process for new condominiums to the Board of Directors.
<b>Operations</b>	4.1 Develop, implement, and update the condominium corporation's <a href="#">annual operating plan</a> .
	4.2 Execute the administrative requirements of owners' meetings.
	4.3 Execute the administrative requirements of Board of Directors' meetings.
	4.4 Support the Board of Directors to align decisions or policies with <a href="#">governing documents</a> and legislation.
	4.5 Follow established procedures for addressing violations to <a href="#">governing documents</a> in a consistent and equitable manner.
	4.6 Advise the Board of Directors in making informed decisions in the best interest of condominium corporation.
	4.7 Analyze and present quotations and contracts to the Board of Directors to allow for effective decisions.
	4.8 Administer contracts on behalf of the condominium corporation.
	4.9 Implement chargebacks to unit owner's accounts in accordance with the <i>Condominium Act</i> .
	4.10 Explain the requirements of <a href="#">cost sharing agreements</a> .
	4.11 Adhere to contractual obligations of condominium management agreements.

Subheading	Competency
	4.12 Coordinate ongoing development and implementation of <a href="#">standard operating procedures</a> .
	4.13 Explain the principles and the requirements of insurance.
	4.14 Support the insurance claims process.
	4.15 Support the insurance appraisal and renewal process.
	4.16 Implement and update the <a href="#">Fire Safety Plan</a> .
	4.17 Manage health and safety compliance requirements.
	4.18 Recognize, act on, and report actual and potential workplace and occupational safety risks.
	4.19 Assist in the development and implementation of emergency procedures.
	4.20 Manage staff employment and performance.
	4.21 Coordinate projects to achieve desired outcomes.
	4.22 Analyze, prioritize, and address issues.
	4.23 Manage vendors and monitor performance.
<b>Legal</b>	5.1 Integrate knowledge of the legal and regulatory framework in which a condominium operates into management activities.
	5.2 Understand <a href="#">hierarchy of documents</a> governing condominiums in Ontario.
	5.3 Apply the Human Rights Code <sup>3</sup> to all management activities.
	5.4 Support legal processes and counsel to protect the interests of the condominium corporation.
	5.5 Apply the agency relationship between the licensee and the condominium corporation.
	5.6 Adhere to legal <a href="#">trust requirements</a> related to condominium funds to ensure the assets of the corporation are protected.
	5.7 Maintain awareness of the Condominium Authority Tribunal <sup>4</sup> process.
	5.8 Apply the Condominium Act (1998) <sup>5</sup> to all management activities.

<sup>3</sup> The Ontario Human Rights Code: <http://www.ohrc.on.ca/en/ontario-human-rights-code>

<sup>4</sup> The Condominium Authority Tribunal: <https://www.condoauthorityontario.ca/en-US/tribunal/the-cat-process/>

<sup>5</sup> Condominium Act: <https://www.ontario.ca/laws/statute/98c19>

Subheading	Competency
<b>Financial</b>	6.1 Prepare, present, and implement the annual budgets.
	6.2 Collect the common expenses.
	6.3 Interpret financial statements and explain variances to the Board of Directors to enable informed decisions.
	6.4 Monitor financial status and report concerns to the Board of Directors.
	6.5 Monitor <a href="#">Reserve Fund</a> spending and balance relative to the <a href="#">Reserve Fund Study</a> .
	6.6 Support the Board of Directors in the <a href="#">Reserve Fund</a> investment process.
	6.7 Support the annual financial audit process.
	6.8 Review general ledger to ensure accurate expense reporting.
	6.9 Implement the financial controls to protect the condominium corporation's financial assets.
<b>Information</b>	7.1 Ensure required notices and filings are completed in accordance with the applicable legislation.
	7.2 Support the transition of the condominium corporation from one management provider to another.
	7.3 Manage client records in accordance with applicable legislation.
	7.4 Prepare <a href="#">Status Certificates</a> .
	7.5 Execute the administrative requirements of the <a href="#">prescribed forms</a> .

### C. Professional

As regulated professionals, Condominium Managers promote and protect the best interests of the condominium corporation while upholding ethical standards of behaviour. They are also committed to continuous professional development to ensure consumer protection.

Subheading	Competency
<b>Ethics</b>	8.1 Comply with the Code of Ethics <sup>6</sup> regulation made under the Condominium Management Services Act. <sup>7</sup>
	8.2 Demonstrate honesty and integrity when offering or providing condominium management services.
	8.3 Provide <a href="#">reasonable accommodation</a> for persons with disabilities.
	8.4 Establish and maintain <a href="#">professional boundaries</a> .

<sup>6</sup> Code of Ethics: <https://www.ontario.ca/laws/regulation/180003>

<sup>7</sup> Condominium Management Services Act: <https://www.ontario.ca/laws/statute/15c28>

Subheading	Competency
	8.5 Recognize limits of personal expertise and professional responsibilities and obtain expert support as deemed necessary by the Board of Directors.
	8.6 Recognize and disclose real and perceived <a href="#">conflicts of interest</a> .
	8.7 Recognize and act in the best interest of the condominium corporation.
	8.8 Demonstrate accountability and accept responsibility.
	8.9 Recognize, act on, and report <a href="#">harmful incidents</a> to the appropriate authority.
	8.10 Administer the requirements of the <a href="#">governing documents</a> in a fair and consistent manner.
<b>Professional Development</b>	9.1 Maintain awareness of emerging trends that may affect the management of condominiums.
	9.2 Maintain awareness of emerging relevant and applicable legislation.
	9.3 Enhance professional knowledge and skills on a regular basis.

## Glossary of Terms (Definitions developed by Subject Matter Experts and/or sourced from existing literature)

Glossary Term	Definition
Active listening	The act of mindfully hearing and attempting to comprehend the meaning of words spoken by another in a conversation or speech. <sup>8</sup>
Annual operating plan	Planned activities for the fiscal year for non-daily or weekly items. It would include items that occur monthly or less frequently and is usually displayed in a monthly calendar type of format. Includes all maintenance and administrative items as well as capital projects for the year.
Building systems	Building systems are the critical systems of your facility, such as the Electrical, HVAC, Security, Life Safety, Lighting, Utilities, Telecom, and Energy Management. These systems are rarely, if ever, independent entities; rather, they depend on each other to operate. <sup>9</sup>
Conflicts of interest	Conflicts of interest exist when an individual has a material interest, either directly or indirectly, in a contract or transaction to which the condominium corporation is a party or when an individual's personal interests oppose the corporation's interests. There is a legal requirement to disclose financial conflicts of interest, whereas it is best practice to disclose ethical conflicts of interest. <sup>10</sup>
Cost-sharing agreements	Refers to an agreement between a Condominium Corporation and one or more persons or parties, or any combination of them, in which they share in the provision, use, maintenance, repair, insurance, operations or administration of any land, any part of a property or proposed property, any assets of a corporation, or any facilities or services. <sup>11</sup>
Fire safety plan	A fire safety plan is a detailed document that covers all aspects of fire safety for a specific building or property. The plan will outline: a safe and orderly way for occupants to evacuate the building; proper maintenance and housekeeping required to prevent fires; and methods of control that minimize the damage from fires when they do occur. <sup>12</sup> The plan must be reviewed annually.
Governing documents	The <i>Condominium Act</i> , the declaration, the by-laws, the condominium description, and the rules and policies that govern a condominium corporation.
Harmful incidents	A client or staff safety incident resulting in harm to the client or staff member. This can be physical, mental, emotional, or financial harm.

<sup>8</sup> Business Dictionary: [www.businessdictionary.com/definition/active-listening.html](http://www.businessdictionary.com/definition/active-listening.html)

<sup>9</sup> Archibus. (2016). Defining Building Systems: [https://www.archibus.net/ai/abizfiles/v23\\_help/archibus\\_help/user\\_en/Subsystems/webc/Content/asset\\_mngmt/background/bldg\\_system\\_define.htm](https://www.archibus.net/ai/abizfiles/v23_help/archibus_help/user_en/Subsystems/webc/Content/asset_mngmt/background/bldg_system_define.htm)

<sup>10</sup> Government of Canada. (2014). Competition Bureau Guidelines on Conflict of Interest: <https://www.competitionbureau.gc.ca/eic/site/cb-bc.nsf/eng/04130.html>

<sup>11</sup> Section 21.1 (1) of the *Condominium Act, 1998*, S.O. 1998, Chapter 19.

<sup>12</sup> Adapted from Canadian Centre for Occupation Health and Safety – Government of Canada: [https://www.ccohs.ca/oshanswers/hsprograms/fire\\_protection.html](https://www.ccohs.ca/oshanswers/hsprograms/fire_protection.html)

Glossary Term	Definition
Hierarchy of documents	<p>The setup and governance of condominiums in Ontario can be found in four documents:</p> <ul style="list-style-type: none"> <li>• The <i>Condominium Act, 1998</i></li> <li>• The condominium declaration</li> <li>• The condominium by-laws</li> <li>• The condominium rules</li> </ul> <p>The provisions of any of these documents cannot be inconsistent or contradict the provisions of a document above it. For instance, the declaration cannot contradict the <i>Condominium Act, 1998</i>, but it has precedence over the by-laws and the rules. Similarly, when a board adopts a new by-law or a new set of rules, these cannot be inconsistent with the Condominium Act or with the Declaration.</p>
Performance audit	<p>A performance audit is a required assessment, conducted by a licensed professional, of the condominium corporation to determine any structural, functional, or cosmetic defects. Such defects are warranted by Tarion. There are specific timelines for each of three assessments.</p>
Prescribed forms	<p>Prescribed forms are mandatory forms under the <i>Condominium Act, 1998</i> or the Regulations. Those include but are subject to change: The proxy (s. 52[4]); the table of contents of the disclosure statement (s. 72[4]); the status certificate (s. 76[1]); the PICs, ICUs, and NOICs (s. 11.1[7], 11.2[4], and 11.3[6] of the Regulations); the preliminary notice of meeting of owners (s. 12.2 of the Regulations); and the notice of meeting of owners (s. 12.8[2]).</p>
Professional boundaries	<p>The point at which the relationship changes from professional to unprofessional and personal. It defines the limit of the professional role. Crossing a boundary means the property manager is misusing power in the relationship or behaving in an unprofessional manner with the client, co-workers, or contractors. The misuse of power does not have to be intentional to be considered a boundary crossing.<sup>13</sup></p>
Professional presence	<p>The demonstration of confidence, integrity, positivity, engagement, and empathy that aligns with legislation, practise standards, and ethics through verbal and non-verbal communications.<sup>14</sup></p>
Property	<p>The land, including the buildings on it, and interests appurtenant to the land, as the land and interests are described in the description and includes all land and interests appurtenant to land that are added to the common elements.<sup>15</sup></p>

<sup>13</sup> Adapted from College of Nurses of Ontario. (2006). Therapeutic nurse-client relationships, revised 2006: [http://www.cno.org/globalassets/docs/%20prac/41033\\_therapeutic.pdf](http://www.cno.org/globalassets/docs/%20prac/41033_therapeutic.pdf)

<sup>14</sup> Canadian Patient Safety Institute. (2017). General patient safety: <https://www.patientsafetyinstitute.ca/en/Topic/Pages/General-Patient-Safety.aspx>

<sup>15</sup> Section 1 (1) of the *Condominium Act, 1998*, S.O. 1998, Chapter 19.



Glossary Term	Definition
Reasonable accommodation	The duty to accommodate is informed by three principles: respect for dignity, individualization, and integration and full participation. <sup>16</sup>
Reserve fund	A reserve fund is a special account with a financial institution such as a bank, loan and trust corporation, or credit union. This account is separate from the condominium's operating fund, and it is used to pay for major repairs and replacements to the condominium's common elements. A portion of the owner's monthly common expenses fee is deposited into the reserve fund every month. The reserve fund is intended to ensure that the corporation has enough money to pay for future repairs. <sup>17</sup>
Reserve fund study	A reserve fund study determines how much money needs to be in the fund to ensure the repairs can be paid for in the future. The reserve fund study must be prepared by a specialist, like an engineer. The board of directors approves the study, then informs owners of the results of the study. You have the right to review the reserve fund study by asking the corporation. <sup>18</sup>
Standard operating procedures	Established or prescribed methods to be followed routinely for the performance of designated operations or in designated situations. SOPs ensure consistency and the meeting of standards regardless of who is performing the task or when it is being performed. <sup>19</sup>
Status certificates	A status certificate is a prescribed document that provides required information about the financial status of the condominium corporation and a specific unit. It includes governance documents such as Declaration, Bylaws, Rules and information about the Reserve Fund, insurance coverage, and any legal proceedings.
Trust requirements	Refers to the obligations of a person receiving money on behalf of or for the benefit of the corporation. <sup>20</sup>

<sup>16</sup> Ontario Human Rights Commission (2014). Policy on preventing discrimination based on mental health disabilities and addictions: [www.ohrc.on.ca/en/policy-preventing-discrimination-based-mental-health-disabilities-and-addictions/13-duty-accommodate](http://www.ohrc.on.ca/en/policy-preventing-discrimination-based-mental-health-disabilities-and-addictions/13-duty-accommodate)

<sup>17</sup> Condominium Authority of Ontario. Reserve fund studies: <https://www.condoauthorityontario.ca/en-US/condominium-living/common-expenses-fee/Reserve-fund-studies/>

<sup>18</sup> Condominium Authority of Ontario. Reserve fund studies: <https://www.condoauthorityontario.ca/en-US/condominium-living/common-expenses-fee/Reserve-fund-studies/>

<sup>19</sup> Adapted from Integrify: <https://www.integrify.com/blog/posts/establish-then-automate-your-standard-operating-procedures/>

<sup>20</sup> Section 115 of the *Condominium Act, 1998*, S.O. 1998, Chapter 19.



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