

# Condominium Management - Building Operations and Maintenance Course Blueprint

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Condominium Management  
Regulatory Authority of Ontario

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# Condominium Management - Building Operations and Maintenance

## Course Overview:

The Condominium Management - Building Operations and Maintenance course is designed to give condominium managers a basic understanding of the relevant aspects of condominium buildings. It is one of the core foundational courses to ensure that condominium managers have the technical context of their role.

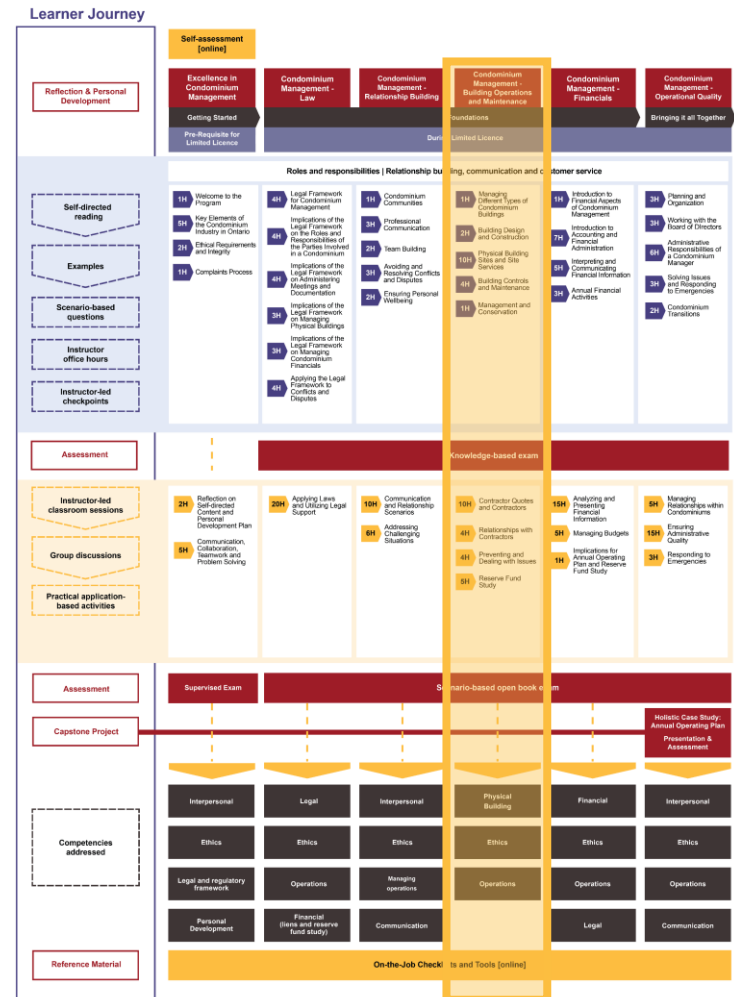
## Course Goals:

- To provide condominium managers with background knowledge of all types of condominium buildings
- To provide condominium managers with the tools and reference materials to locate and understand more detailed information in situations where they need it
- To ensure that condominium managers understand their roles and responsibilities with the repair and maintenance of condominium buildings
- To provide condominium managers with the skills and behaviours to build effective relationships with external contractors and manage the insurance process
- To ensure condominium managers have a detailed understanding of the end-to-end requirements of the Reserve Fund Study

## Course Structure:

- Self-directed learning to obtain basic knowledge of considerations and requirements of condominium buildings. Supported by checkpoints to guide and monitor learner progress, and instructor office hours for any questions and concerns about self-directed content
- Knowledge-based multiple-choice exam to check understanding of basic principles
- Instructor-led classroom sessions bring to life the practical implications of the physical building theory
- Scenario-based open-book exam focusing on making correct decisions in situations involving physical buildings

# CONDOMINIUM MANAGER GENERAL LICENCE EDUCATION ROADMAP



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**Instructor Welcome to the Course**

Formal start to the course with instructor providing overview of:

- Course structure
- Course expectations
- Assessment requirements

**Managing Different Types of Condominium Buildings**

| Competencies Addressed                                                   | Learning Objectives                                                                                                                                                                                                                      | Bloom’s Taxonomy Level                                                 |
|--------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------|
| 3.1 Apply knowledge of building systems in the management of properties. | Recall the main types of condominium building.<br>Explain the main differences between the main types of condominium building.<br>Recognize the different management approaches that are required for each type of condominium building. | Level 1: Knowledge<br>Level 2: Comprehension<br><br>Level 1: Knowledge |

| Topic                                | Content                                                                                                                                                                                                                                     | Format / Examples / Notes                    | Source Content |
|--------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------|----------------|
| <i>Types of condominium building</i> | Overview of the types of condominium building <ul style="list-style-type: none"> <li>• High-rise</li> <li>• Mid-rise</li> <li>• Town house</li> <li>• Industrial/commercial and common element</li> </ul> Where each type is most prevalent | Annotated images/illustrations for each type | New content    |

Condominium Management - Building Operations and Maintenance > Self-Directed Learning > **Managing Different Types of Condominium Buildings**

| Topic                                      | Content                                                                                                                                                                                                                                                                                                 | Format / Examples / Notes                                                                                                                                                                                                                      | Source Content |
|--------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| <i>Comparison of condominium buildings</i> | Comparison of the condominium types outlining: <ul style="list-style-type: none"> <li>• Key physical building differences</li> <li>• Any elements that are unique to each type</li> <li>• Impact of each type on declarations and descriptions</li> <li>• Management considerations for each</li> </ul> | Examples: Variances within each type of condominium, highlighting the importance of recognizing impact of declaration and by-laws<br><br>Case study: Specific management requirements of industrial/commercial and common-element condominiums | New content    |

**Building Design and Construction**

| Competencies Addressed                                                           | Learning Objectives                                                                                                                                                                                                                 | Bloom’s Taxonomy Level                               |
|----------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------|
| 3.1 Apply knowledge of building systems in the management of properties.         | Identify situations when a condominium manager would need to refer to building documentation and building codes when managing buildings.<br><br>Locate relevant building documentation and building-code information when required. | Level 2: Comprehension<br><br>Level 2: Comprehension |
| 3.6 Explain the requirements and process of the Performance Audit.               | Explain the requirements and process of the Performance Audit.                                                                                                                                                                      | Level 2: Comprehension                               |
| 3.7 Explain the warranty process for new condominiums to the Board of Directors. | Explain the warranty process for new condominiums.                                                                                                                                                                                  | Level 2: Comprehension                               |

| Topic                         | Content                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | Format / Examples / Notes                                                               | Source Content                                                            |
|-------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------|---------------------------------------------------------------------------|
| <i>Building documentation</i> | <p>Overview of main building documents</p> <ul style="list-style-type: none"> <li>• Maintenance manuals</li> <li>• Specifications</li> <li>• Drawings (architectural, structural, electrical, mechanical, interior design, and landscaping)</li> </ul> <p>In each case:</p> <ul style="list-style-type: none"> <li>• Where to find these documents</li> <li>• How to read the documents</li> <li>• What to look out for as a condominium manager</li> <li>• Common reasons you may need to consult the documents</li> </ul> | Annotated examples of each document highlighting key information and points of interest | <p>Existing course content</p> <p>New content for additional guidance</p> |

| Topic                                               | Content                                                                                                                                                                                             | Format / Examples / Notes                                                                                                                        | Source Content                                                         |
|-----------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------|
| <i>Building codes</i>                               | Overview of relevant building codes<br>What you need to know as a condominium manager                                                                                                               | Examples: When a condominium manager would need to refer to building codes                                                                       | Existing course content<br><br>New content – examples                  |
| <i>Considerations for new condominium buildings</i> | <i>Ontario New Home Warranties Plan Act, 1990 (ONHWP)</i><br>Ensuring handover of relevant documentation<br>Tarion warranty<br>Performance audits<br>Warranty deficiencies<br>Conciliation meetings | Process map and checklist: For end-to-end process of a new building including documentation, warranty, performance audits, reports, and meetings | Existing course content<br><br>New content – process map and checklist |

Regular office hours available throughout section to allow learners to discuss any questions or concerns they have about the content with the instructor.

**Learner Checkpoint: Different types of condominium building, building design, and construction assignment**

- Online multiple-choice assignment to ensure understanding of topics
- Feedback provided electronically with opportunity to meet with the instructor during office hours to discuss any follow-up questions and concerns

**Physical Building Sites and Site Services**

| Competencies Addressed                                                                                  | Learning Objectives                                                                                                                                                                                                                                                                                                                                                             | Bloom's Taxonomy Level                                                            |
|---------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|
| <p>3.1 Apply knowledge of building systems in the management of properties.</p>                         | <p>Recall the different types of building sites and site services that need to be managed within condominiums.</p> <p>Recognize the different management requirements of sites and site services in each type of condominium building.</p> <p>Locate additional guidance and reference material on the management requirements of each site and site service when required.</p> | <p>Level 1: Knowledge</p> <p>Level 1: Knowledge</p> <p>Level 2: Comprehension</p> |
| <p>3.2 Conduct general inspections of the property to identify maintenance and repair requirements.</p> | <p>Explain the role of the condominium manager in completing general inspections.</p> <p>Locate the additional guidance on key considerations when completing inspections of relevant sites and site services.</p>                                                                                                                                                              | <p>Level 2: Comprehension</p> <p>Level 2: Comprehension</p>                       |



Condominium Management - Building Operations and Maintenance > Self-Directed Learning > **Physical Building Sites and Site Services**

| Topic                          | Content                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | Format / Examples / Notes                                                                                                                                                                                                                                           | Source Content                                                                                     |
|--------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------|
| <i>Physical building sites</i> | <p>Provide overview of each topic:</p> <ul style="list-style-type: none"> <li>• Detail provided for reference (not required reading ahead of classroom sessions)</li> <li>• Focus of main content                             <ul style="list-style-type: none"> <li>○ Inspection and maintenance requirements</li> <li>○ Key questions to ask a contractor</li> <li>○ Differences between each building type</li> </ul> </li> </ul> <p>Sites:</p> <ul style="list-style-type: none"> <li>• Decks and fencing</li> <li>• Landscaping</li> <li>• Amenities</li> <li>• Building envelope</li> <li>• Foundations and footings</li> <li>• Below grade and drainage</li> <li>• Underground parking garages</li> <li>• Concrete</li> <li>• Building envelope (walls, roofing, windows, cladding, and caulking)</li> <li>• Doors</li> <li>• Elevators</li> <li>• Fireplaces and chimneys</li> </ul> | <p>Annotated images and illustrations provided for each site</p> <ul style="list-style-type: none"> <li>• Examples for all types of condominium buildings (where relevant)</li> <li>• What to look for in inspections</li> <li>• Common issues or faults</li> </ul> | <p>Existing course content</p> <p>New content – examples for all types of condominium building</p> |

Condominium Management - Building Operations and Maintenance > Self-Directed Learning > **Physical Building Sites and Site Services**

| Topic                                                   | Content                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | Format / Examples / Notes                                                                                                                                                                                                                                           | Source Content                                                                                     |
|---------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------|
| <p><i>Physical building sites and site services</i></p> | <p>Provide overview of each topic:</p> <ul style="list-style-type: none"> <li>• Detail provided for reference (not required reading ahead of classroom sessions)</li> <li>• Focus of main content                             <ul style="list-style-type: none"> <li>○ Inspection and maintenance requirements</li> <li>○ Key questions to ask a contractor</li> <li>○ Differences between each building type</li> </ul> </li> </ul> <p>Sites and Site Services:</p> <ul style="list-style-type: none"> <li>• Water utility</li> <li>• Storm water</li> <li>• Domestic cold water</li> <li>• Sanitary sewage systems</li> <li>• Plumbing systems</li> <li>• HVAC systems</li> <li>• Electricity</li> <li>• Life safety systems (fire hydrants, sprinkler systems)</li> <li>• Backflow valve testing</li> <li>• Waste management</li> <li>• Garage exhaust fans</li> <li>• Garage doors</li> <li>• Pools and spas</li> <li>• Painting</li> <li>• Pest control</li> <li>• Carpet cleaning</li> </ul> | <p>Annotated images and illustrations provided for each site</p> <ul style="list-style-type: none"> <li>• Examples for all types of condominium buildings (where relevant)</li> <li>• What to look for in inspections</li> <li>• Common issues or faults</li> </ul> | <p>Existing course content</p> <p>New content – examples for all types of condominium building</p> |

Regular office hours available throughout section to allow learners to discuss any questions or concerns they have about the content with the instructor.

**Learner Checkpoint: Physical building site and site services tutorial**

- Instructor-led tutorial
- Learners submit questions and instructor provides answers during tutorial
- Group exercise: Each group assigned a site or site service
  - Create and deliver presentation on:
    - Inspection and maintenance requirements
    - Key questions to ask a contractor
    - Differences between each building type

**Building Controls and Maintenance**

| Competencies Addressed                                                                                            | Learning Objectives                                                                                                                                                                                                               | Bloom’s Taxonomy Level                                      |
|-------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------|
| 3.2 Conduct general inspections of the property to identify maintenance and repair requirements.                  | <p>Explain the role of the condominium manager in completing general inspections.</p> <p>Locate the additional guidance on key considerations when completing inspections of relevant sites and site services.</p>                | <p>Level 2: Comprehension</p> <p>Level 2: Comprehension</p> |
| 3.3 Manage inspections, testing, maintenance, repair, and replacement obligations of the condominium corporation. | Recall the legal obligations for inspections, testing, maintenance, repair, and replacement in a condominium corporation.                                                                                                         | Level 1: Knowledge                                          |
| 3.4 Explain the requirements and process of the Reserve Fund Study.                                               | Explain the requirements and process of the Reserve Fund Study.                                                                                                                                                                   | Level 2: Comprehension                                      |
| 3.5 Assist in the development and implementation of the Reserve Fund Study.                                       | Identify the role of the condominium manager in the development and implementation of the Reserve Fund Study.                                                                                                                     | Level 1: Knowledge                                          |
| 4.17 Manage health and safety compliance requirements.                                                            | <p>Describe the health and safety standards and regulations that are relevant to condominium management.</p> <p>Locate the additional guidance on key considerations when managing health and safety compliance requirements.</p> | <p>Level 2: Comprehension</p> <p>Level 2: Comprehension</p> |
| 4.18 Recognize, act on, and report actual and potential workplace and occupational safety risks.                  | <p>Recall the potential workplace and occupational safety risks within condominiums, and the processes and policies for managing them.</p> <p>Identify situations that present significant health and safety risks.</p>           | <p>Level 1: Knowledge</p> <p>Level 2: Comprehension</p>     |
| 4.23 Manage vendors and monitor performance.                                                                      | Recall the main considerations when managing repair and maintenance contracts.                                                                                                                                                    | Level 1: Knowledge                                          |

Condominium Management – Building Operations and Maintenance > Self-Directed Learning > **Building Controls and Maintenance**

| Topic                              | Content                                                                                                                                                          | Format / Examples / Notes                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | Source Content                                                                                  |
|------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------|
| <i>Health and safety standards</i> | <p><i>Ontario Health and Safety Act, 1990</i></p> <p>Global Harmonized Systems</p> <p>Building signage</p>                                                       | <p>Examples: Situations that present the greatest health and safety risks</p> <p>Case studies: Real life examples that show the importance of complying with Health &amp; Safety Standards</p>                                                                                                                                                                                                                                                                                                                                                | <p>Existing course content</p> <p>New content – examples and case study</p>                     |
| <i>Reserve Fund Study</i>          | <p>Purpose</p> <p>Types of study</p> <p>Process</p>                                                                                                              | <p>Process map: Stages of the Reserve Fund Study and timelines</p> <p>Example: Completed Reserve Fund Study</p>                                                                                                                                                                                                                                                                                                                                                                                                                               | <p>Existing course content</p> <p>New content – process map</p>                                 |
| <i>Maintenance and repair</i>      | <p>Inspections: Condominium manager’s roles and responsibilities</p> <p>Legal requirements</p> <p>Most common maintenance and repair issues by building type</p> | <p>High-rise Case Study: Structural concrete problems</p> <ul style="list-style-type: none"> <li>• Common concrete problems</li> <li>• Identifying problems</li> <li>• Repair and protection</li> </ul> <p>Mid-rise Case Study: Make-up air units</p> <ul style="list-style-type: none"> <li>• Issues caused by timer mismanagement</li> </ul> <p>Town House Case Study: Issues with retaining walls</p> <ul style="list-style-type: none"> <li>• Common problems</li> <li>• Identifying problems</li> <li>• Repair and protection</li> </ul> | <p>Existing course content</p> <p>New content – roles and responsibilities and case studies</p> |

Condominium Management – Building Operations and Maintenance > Self-Directed Learning > **Building Controls and Maintenance**

| Topic                                   | Content                                                                                                                                                                                                                                       | Format / Examples / Notes                                                                                                                                                                 | Source Content                                        |
|-----------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------|
| <i>Maintenance and repair contracts</i> | Notice<br>Cost considerations<br>Types of contracts <ul style="list-style-type: none"> <li>• Contractor only</li> <li>• Design build</li> <li>• Bonds</li> </ul> WSIB requirements for contractors<br>Common maintenance and repair contracts | Examples of common maintenance and repair contractors for all building types <ul style="list-style-type: none"> <li>• Landscaping</li> <li>• Amenities</li> <li>• Pest Control</li> </ul> | Existing course content<br><br>New content – examples |

**Management and Conservation**

| Competencies Addressed                                                   | Learning Objectives                                                                                                                                                                                                  | Bloom’s Taxonomy Level                           |
|--------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------|
| 3.1 Apply knowledge of building systems in the management of properties. | Recall the main management and conservation considerations in condominium management.<br><br>Locate additional guidance and reference material on the management and conservation options in condominium management. | Level 1: Knowledge<br><br>Level 2: Comprehension |

| Topic                                          | Content                                                                                                                                                                                                                                                                                                                 | Format / Examples / Notes                                                                                                                             | Source Content          |
|------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------|
| <i>Why energy management and conservation?</i> | Benefits of energy management and conservation: <ul style="list-style-type: none"> <li>• Cost saving</li> <li>• Fewer issues / physical losses</li> <li>• Demonstrating responsibility</li> <li>• Savings on maintenance and repair costs</li> <li>• Environmental stewardship</li> <li>• Carbon tax/credits</li> </ul> | Case Study: Condominium manager who successfully managed energy. <ul style="list-style-type: none"> <li>• Benefits for them and the owners</li> </ul> | New content             |
| <i>Energy management options</i>               | Monitoring utility use frequently<br>Lighting<br>Energy conservation options<br>Performance contracts<br>Building Automated Systems                                                                                                                                                                                     |                                                                                                                                                       | Existing course content |

| Topic                                                                 | Content                                                                                                                                                                                                                                                                                                                                                              | Format / Examples / Notes                                                                                                                                                                                                                                           | Source Content          |
|-----------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------|
| <i>Water conservation options</i>                                     | Monitoring utility use frequently<br>Bathrooms<br>Irrigation systems                                                                                                                                                                                                                                                                                                 | Case study: Successful use of dye test to identify leaks in toilets<br><ul style="list-style-type: none"><li>Water conservation, low cost, popular with residents</li></ul>                                                                                         | Existing course content |
| <i>Practicalities of implementing management conservation options</i> | Roles and responsibilities of condominium managers in implementing options<br>Ensuring appropriate jurisdiction and permission<br>Implications of implementing<br><ul style="list-style-type: none"><li>Financial expenses</li><li>Changes to physical building</li><li>Legal obligations of the management company</li></ul> Asking questions before implementation | Case study: How to effectively implement a management or conservation project<br><ul style="list-style-type: none"><li>Checking with professional advisers beforehand</li><li>Ensuring compliance with by-laws and rules</li><li>Seeking owner permission</li></ul> | New content             |
| <i>Mandated reporting</i>                                             | Energy and water reporting requirements<br>Contractor support                                                                                                                                                                                                                                                                                                        | Checklist for reporting                                                                                                                                                                                                                                             | New content             |

Regular office hours available throughout section to allow learners to discuss any questions or concerns they have about the content with the instructor.

**Learner Checkpoint: Different types of condominium building, building design, and construction assignment**

- Online multiple-choice assignment to ensure understanding of topics
- Feedback provided electronically with opportunity to meet with the instructor during office hours to discuss any follow-up questions and concerns



**Contractor Quotes and Contracts**

| <b>Competencies Addressed</b>                                                                                                                         | <b>Learning Objectives</b>                                                                                                                                                                                                                                         | <b>Bloom's Taxonomy Level</b> |
|-------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------|
| 1.1 Engage in collaboration and teamwork in the delivery of management services.                                                                      | Use participatory decision making to achieve consensus when awarding contracts for physical buildings.                                                                                                                                                             | Level 3: Application          |
| 4.7 Analyze and present quotations and contracts to the Board of Directors to allow for effective decisions.                                          | <p>Explain the requirements and benefits of obtaining multiple quotations.</p> <p>Compare multiple quotations and present findings to enable informed decisions when awarding contracts for physical buildings.</p>                                                | Level 4: Analysis             |
| 4.8 Administer contracts on behalf of the condominium corporation.                                                                                    | Recognize best practice principles when drafting physical building contracts.                                                                                                                                                                                      | Level 1: Knowledge            |
| 8.5 Recognize limits of personal expertise and professional responsibilities and obtain expert support as deemed necessary by the Board of Directors. | <p>Identify procurement situations that are beyond the professional limitations of condominium management.</p> <p>Explain the communication techniques that can be employed to get Board of Director support for external support in large-scale procurements.</p> | Level 2: Comprehension        |

| Topic                   | Content                                                                                                                                                                                                                                                                                                                                                                         | Format / Examples / Notes                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | Source Content |
|-------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| <i>Obtaining quotes</i> | Requirements and benefits of obtaining multiple quotes<br>Writing requests for quotations<br>Who to ask for quotes? <ul style="list-style-type: none"> <li>• How many quotes to obtain?</li> </ul> Obtaining quotes for large-scale projects <ul style="list-style-type: none"> <li>• Recognizing when to use a consultant</li> <li>• Process for using a consultant</li> </ul> | Group exercise: Provided with a scenario, work in a group to list: <ul style="list-style-type: none"> <li>• The information you need to provide in the request</li> <li>• The information you need to ask for in the request</li> </ul> Examples: Review best practice examples for requesting quotes <ul style="list-style-type: none"> <li>• Reflection on what makes them effective</li> </ul> Group discussion: How best to communicate the need to use external consultant to a Board and respond to any resistance | New content    |
| <i>Analyzing quotes</i> | Comparing apples with apples<br>Scoring <ul style="list-style-type: none"> <li>• Criteria</li> <li>• Who to involve?</li> </ul> Price versus value for money<br>Asking for clarifications<br>Seeking references<br>Participatory decision making in quote selection                                                                                                             | Group exercise: Provided with three quotes, work as a group to compare the quotes and select the one you would proceed with <ul style="list-style-type: none"> <li>• Present back to the class to explain your recommendation and provide your rationale</li> </ul> Mock Board Discussion: Practice participatory decision-making techniques to get consensus when selecting a quote                                                                                                                                     | New content    |

Condominium Management – Building Operations and Maintenance > Instructor-Led Classroom Sessions > **Contractor Quotes and Contracts**

| Topic                     | Content                                                                                                                                                                                                                   | Format / Examples / Notes                                                                                                                                                                                                                                      | Source Content                                                                                  |
|---------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------|
| <i>Drafting contracts</i> | Overview of contract law<br>What to include in a contract?<br>Common contract issues and pitfalls<br>CCDC contracts <ul style="list-style-type: none"> <li>• Overview and process</li> <li>• Purpose and value</li> </ul> | Exercise: Provided with a response to a request for quotation, what components need to be included in the contract?<br><br>Group exercise: Provided with a good and a bad example of a contract, identify the best practices and areas for improvement in each | Existing course content<br><br>New content – common contract issues and pitfalls, and exercises |

**Relationships with Contractors**

| Competencies Addressed                                                                                            | Learning Objectives                                                                                                                                                             | Bloom’s Taxonomy Level                               |
|-------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------|
| 2.2 Develop and maintain professional relationships in the delivery of management services.                       | Explain the importance of developing good professional relationships with contractors.<br><br>Describe best practices for working with contractors.                             | Level 2: Comprehension<br><br>Level 2: Comprehension |
| 3.3 Manage inspections, testing, maintenance, repair, and replacement obligations of the condominium corporation. | Recognize when external expertise is required to effectively manage the inspections, testing, maintenance, repair, and replacement obligations of the condominium corporation.  | Level 1: Knowledge                                   |
| 4.23 Manage vendors and monitor performance.                                                                      | Describe best practices for managing and monitoring external contractors.                                                                                                       | Level 2: Comprehension                               |
| 8.1 Comply with the Code of Ethics regulation made under the <i>Condominium Management Services Act, 2015</i> .   | Recall the ethics challenges that are associated relationships with contractors.<br><br>Recognize the consequences of acting unethically in situations involving contractors.   | Level 1: Knowledge<br><br>Level 1: Knowledge         |
| 8.6 Recognize and disclose real and perceived conflicts of interest.                                              | Identify the ethics challenges that are associated relationships with contractors.<br><br>Recognize the consequences of acting unethically in situations involving contractors. | Level 2: Comprehension<br><br>Level 2: Comprehension |

Condominium Management – Building Operations and Maintenance > Instructor-Led Classroom Sessions > **Relationships with Contractors**

| Topic                                   | Content                                                                                                                                                                                                                                                                                            | Format / Examples / Notes                                                                                                                                                                                                                                                                                                                                                                                                                            | Source Content |
|-----------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| <i>Learning from contractors</i>        | When to call a contractor<br>How to learn from contractors <ul style="list-style-type: none"> <li>• Meet and greet</li> <li>• Shadowing</li> <li>• Asking questions</li> </ul>                                                                                                                     | Group exercise: Provided with scenarios where an issue has been identified with the physical building <ul style="list-style-type: none"> <li>• Decide whether you would call a contractor and explain rationale.</li> </ul> Group exercise: Scenarios where contractor is called: <ul style="list-style-type: none"> <li>• What questions would you ask?</li> <li>• What are the main considerations to look out for to check completion?</li> </ul> | New content    |
| <i>Performance and contract issues</i>  | Common performance and contract issues<br>Prompt payment issues<br>Strategies for addressing issues of contract disputes <ul style="list-style-type: none"> <li>• Informal</li> <li>• Formal</li> </ul> Construction Act, 1990 adjudication process and resolution<br>Options for external support | Role play exercise: Work through a dispute with a contractor <ul style="list-style-type: none"> <li>• Seeing the situation from both sides</li> <li>• Attempting to find resolution through informal methods.</li> </ul>                                                                                                                                                                                                                             | New content    |
| <i>Ethics and conflicts of interest</i> | Situations where ethics may be compromised<br>Guidance on common conflicts of interest with contractors                                                                                                                                                                                            | Group exercise: Discuss “What would you do?” ethics scenarios that a condominium manager may encounter<br>Case studies: Real-life examples to show negative consequences of acting unethically in situations with contractors                                                                                                                                                                                                                        | New content    |

Condominium Management – Building Operations and Maintenance > Instructor-Led Classroom Sessions > **Preventing and Dealing with Issues**

**Preventing and Dealing with Issues**

| Competencies Addressed                                                                                                                                | Learning Objectives                                                                                                                                                              | Bloom’s Taxonomy Level |
|-------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------|
| 1.2 Manage time and workload to meet the contractual obligations of the condominium management agreement.                                             | Apply project management techniques to the management of inspections, testing, maintenance, repair, and replacement obligations.                                                 | Level 3: Application   |
| 3.2 Conduct general inspections of the property to identify maintenance and repair requirements.                                                      | Recognize best-practice principles for conducting general inspections.                                                                                                           | Level 1: Knowledge     |
| 3.3 Manage inspections, testing, maintenance, repair, and replacement obligations of the condominium corporation.                                     | Apply project management techniques to the management of inspections, testing, maintenance, repair, and replacement obligations.                                                 | Level 3: Application   |
| 8.5 Recognize limits of personal expertise and professional responsibilities and obtain expert support as deemed necessary by the Board of Directors. | Recognize limits of personal expertise and professional responsibilities within maintenance and repairs and obtain expert support as deemed necessary by the Board of Directors. | Level 2: Comprehension |

| Topic                              | Content                                                                                                                                                      | Format / Examples / Notes                                                                                                                           | Source Content                                                             |
|------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------|
| <i>Inspections and maintenance</i> | Best practice for inspections<br>Planning and organization <ul style="list-style-type: none"> <li>• Annual plans</li> <li>• Maintenance schedules</li> </ul> | Exercise: Using template to create an annual plan for the maintenance requirements for three sites of services (e.g., Elevators, Landscaping, etc.) | Existing course content<br><br>New content – best practice for inspections |

Condominium Management – Building Operations and Maintenance > Instructor-Led Classroom Sessions > **Preventing and Dealing with Issues**

| Topic                              | Content                                                                                                                                                                                                                                                                                                             | Format / Examples / Notes                                                                                                                                                                           | Source Content |
|------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| <i>Utilizing available support</i> | Support available: <ul style="list-style-type: none"> <li>• Supervisor</li> <li>• Management company building department</li> <li>• Relevant owners and Directors with engineering expertise</li> <li>• External contractors, i.e.: lawyers, engineering consultants and insurance appraisers</li> <li>•</li> </ul> | Group exercise: Provided with scenarios where an issue has been identified with the physical building. <ul style="list-style-type: none"> <li>• Who would you contact in each situation?</li> </ul> | New content    |

**Reserve Fund Study**

| Competencies Addressed                                                      | Learning Objectives                                                                                                                                                                                                                                      | Bloom’s Taxonomy Level                                                           |
|-----------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------|
| 2.1 Adapt communication strategies to suit different audiences.             | Recognize the communication needs of the main audiences for the Reserve Fund Study.<br><br>Identify the key aspects of the Reserve Fund Study to be communicated to different audiences.                                                                 | Level 1: Knowledge<br><br>Level 2: Comprehension                                 |
| 2.3 Communicate clearly and concisely orally and in writing.                | Employ best practice techniques for presentation skills when presenting the Reserve Fund Study.                                                                                                                                                          | Level 3: Application                                                             |
| 3.4 Explain the requirements and process of the Reserve Fund Study.         | Explain the requirements and process of the Reserve Fund Study.                                                                                                                                                                                          | Level 2: Comprehension                                                           |
| 3.5 Assist in the development and implementation of the Reserve Fund Study. | Apply project management techniques to the management of the Reserve Fund Study process.<br><br>Explain the process for creating a Reserve Fund budget for a condominium corporation.<br><br>Describe the legal requirements of the Reserve Fund budget. | Level 3: Application<br><br>Level 2: Comprehension<br><br>Level 2: Comprehension |



| Topic                                    | Content                                                                                                                                                                                                                                                    | Format / Examples / Notes                                                                                                                                                                                                                                                                                                                                | Source Content |
|------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| <i>Managing the Reserve Fund Study</i>   | Process for the Reserve Fund Study <ul style="list-style-type: none"> <li>• Milestones</li> <li>• Critical paths</li> </ul> Deadlines and planning                                                                                                         | Exercise: Using template, create a high-level project plan to deliver Reserve Fund Study on time                                                                                                                                                                                                                                                         | New content    |
| <i>Presenting the Reserve Fund Study</i> | Audiences to the Reserve Fund Study and what they are interested in <ul style="list-style-type: none"> <li>• Board of Directors</li> <li>• Owners</li> <li>• Auditor</li> </ul> What to look for when presenting Reserve Fund Study<br>Presentation skills | Exercise: Provided with a Reserve Fund Study <ul style="list-style-type: none"> <li>• Review and identify the key points to highlight for each audience</li> </ul> Practice: Select one audience and create a presentation to communicate the key messages <ul style="list-style-type: none"> <li>• Deliver presentation to rest of the group</li> </ul> | New content    |

| Topic                                         | Content                                                                                                                                                                                                                                                                                                                                                                       | Format / Examples / Notes                                                                                                                                                                                      | Source Content     |
|-----------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------|
| <p><i>Setting the Reserve Fund Budget</i></p> | <p>Ensuring adequate funding</p> <p>Differences between reserve fund and operating budget</p> <p>Planning expenses</p> <ul style="list-style-type: none"> <li>• Requirements identified in study</li> <li>• Any additional elements the corporation is aware of (e.g., new development)</li> </ul> <p>How funding plan can differ from study</p> <p>Implementing the plan</p> | <p>Exercise: Provided with Reserve Fund Study and funding plan</p> <ul style="list-style-type: none"> <li>• Identify divergence from the study</li> <li>• Discuss process for implementing the plan</li> </ul> | <p>New content</p> |



Condominium Management  
Regulatory Authority of Ontario

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