

Condominium Management - Operational Quality Course Blueprint



Condominium Management
Regulatory Authority of Ontario

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Condominium Management - Operational Quality

Course Overview:

The Condominium Management - Operational Quality course is the final course in the program and brings the content for all the previous courses together. The primary focus for the course is the application-based content, but the self-directed section does expand on the content introduced in the previous courses. It also introduces a small number of new topic areas. The aim is to highlight how the technical content should be applied and integrated into condominium managers' day-to-day role to ensure high standards of performance.

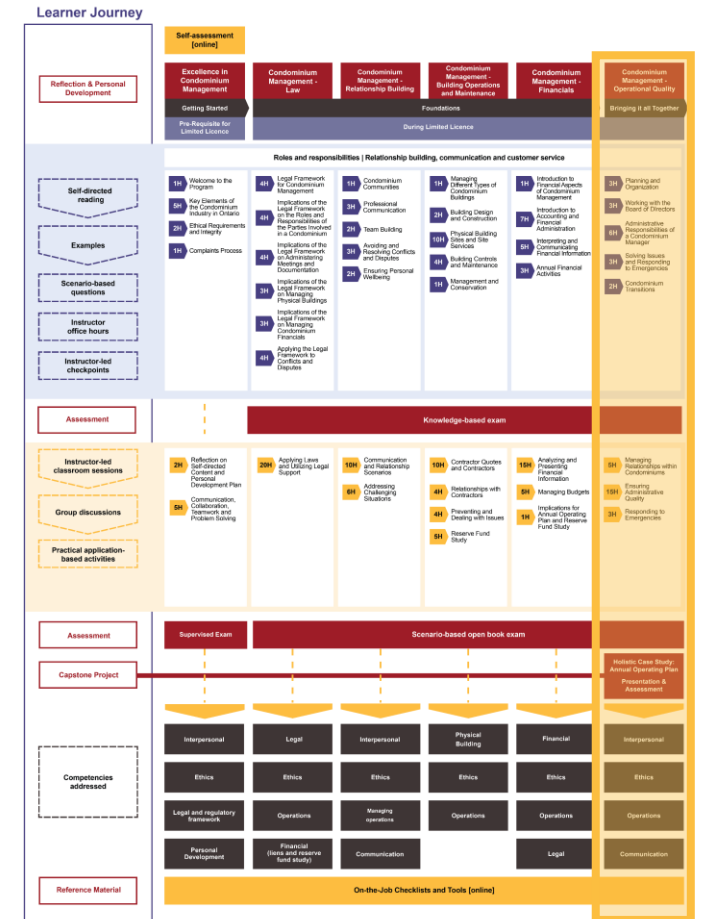
Course Goals:

- To demonstrate to condominium managers how to apply the rules, regulations, standards, and best practices to their administrative responsibilities
- To equip condominium managers with the skills and confidence to manage the end-to-end process of their main responsibilities
- To ensure that condominium managers are aware of the requirements and best practices for developing standard operating and emergency procedures
- To inspire condominium managers to strive for high standards in the delivery of their condominium management services

Course Structure:

- Self-directed learning provides an overview of the administrative and operational tasks a condominium manager with a general licence will be expected to execute. 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 administrative tasks
- Instructor-led classroom sessions to discuss and practice the operational activities in a safe learning environment
- Scenario-based open-book exam focusing on making correct decisions in legal situations
- Capstone project that brings together all the elements learned in the program into an annual operating plan, to be presented to the instructor and group

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

Planning and Organization

Competencies Addressed	Learning Objectives	Bloom’s Taxonomy Level
1.2 Manage time and workload to meet the contractual obligations of the condominium management agreement.	Recognize the importance of planning and organization in the role of the condominium manager. Explain how project management techniques can support a condominium manager to manage their time and workload.	Level 1: Knowledge Level 2: Comprehension
4.21 Coordinate projects to achieve desired outcomes.	Explain the project life cycle as it relates to projects within condominium management.	Level 2: Comprehension
4.22 Analyze, prioritize, and address issues.	Describe the techniques for analyzing and prioritizing issues within condominium management.	Level 2: Comprehension

Topic	Content	Format / Examples / Notes	Source Content
<i>Importance of planning and organization</i>	A day in the life of the condominium manager – bringing together all the demands on a condominium manager’s time Balancing day-to-day with the long-term projects	Case studies: A “standard” day for a condominium manager in different condominium building types Case study: A terrible day for a condominium manager and how they dealt with it	New content

Topic	Content	Format / Examples / Notes	Source Content
<i>Project management</i>	Full project life cycle Project management processes <ul style="list-style-type: none"> • Scheduling and tracking tasks • Communication and stakeholder management • Identifying project risks Technology tools to support project management	Templates: Project-management process templates	New content
<i>Organization and time management</i>	Tips for filing and correspondence <ul style="list-style-type: none"> • Keeping up-to-date owners' records • Common documents and correspondence found on a manager's desk • How to create reminders and tasks to follow up Prioritizing tasks <ul style="list-style-type: none"> • Time-management matrix • Breaking down tasks Time management <ul style="list-style-type: none"> • To-do lists • Using calendars to manage time Technology tools to support organization, time management, and record-keeping	Tip sheets: Filing, tracking, and technology Templates: Matrix, to-do lists, calendars	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: Planning and organization assignment

- Provided with a list of tasks to complete – use the to-do list template to break down the tasks into their component parts and prioritize into a to-do list for a week
 - Submit to instructor electronically
- Feedback provided electronically with opportunity to meet with the instructor during office hours to discuss any follow-up questions and concerns

Working with the Board of Directors

Competencies Addressed	Learning Objectives	Bloom’s Taxonomy Level
1.1 Engage in collaboration and teamwork in the delivery of management services.	Summarize best practices for collaborating with the Board of Directors of a condominium corporation.	Level 2: Comprehension
1.4 Apply strategies to resolve conflict.	Recall the most common conflicts that arise between condominium managers and Board of Directors. Recall the most common conflicts that arise between Directors of the Board. Identify the most appropriate strategy to resolve the conflict in each case.	Level 1: Knowledge Level 1: Knowledge Level 2: Comprehension
1.8 Manage expectations in an empathetic manner.	Explain the techniques that a condominium manager can use to successfully manage the expectations of the Board of Directors.	Level 2: Comprehension
2.1 Adapt communication strategies to suit different audiences.	Identify common Director personas and recall the most effective way to communicate with each.	Level 2: Comprehension
2.2 Develop and maintain professional relationships in the delivery of management services.	Summarize the best practices for developing and maintaining a professional relationship with the Board of Directors of a condominium corporation.	Level 2: Comprehension
2.3 Communicate clearly and concisely orally and in writing.	Explain the best practices for communicating with the Board of Directors.	Level 2: Comprehension
4.4 Support the Board of Directors to align decisions or policies with governing documents and legislation.	Recognize the role of the condominium manager in supporting the Board of Directors to align decisions or policies with governing documents and legislation.	Level 1: Knowledge
8.1 Comply with the Code of Ethics regulation made under the <i>Condominium Management Services Act, 1990</i> .	Recognize the ethical challenges that a condominium manager may encounter when working with the Board of Directors.	Level 1: Knowledge
8.2 Demonstrate honesty and integrity when offering or providing condominium management services.	Explain the negative consequences of acting unethically in situations involving the Board of Directors.	Level 2: Comprehension

Topic	Content	Format / Examples / Notes	Source Content
<i>Roles and responsibilities</i>	Roles and responsibilities of the Board of Directors Managing Board expectations		Existing course content
<i>Understanding communication preferences</i>	Introduction to communication preferences concept Personality types found on Boards Communication preferences of different personality types	Example Personas: for different personality types <ul style="list-style-type: none"> • How to communicate with them • Challenges posed by the persona 	Existing course content
<i>Challenges of working with the Board of Directors</i>	Different communication preferences Disagreement among Directors Requests that are unethical or illegal Overrunning board meetings Coping with micromanagement Handling Board decisions made against manager's advice or other professional advice for Directors acting unethically	Self-reflection exercise: Case study for each challenge, self-reflection on how to resolve and guidance on best practices	Existing course content New content – case studies and self-reflection exercises
<i>Director education</i>	Overview of training available to Directors		Existing course content

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

Administrative Responsibilities of a Condominium Manager

Competencies Addressed	Learning Objectives	Bloom’s Taxonomy Level
4.2 Execute the administrative requirements of owners’ meetings.	Explain the roles and responsibilities of a condominium manager in the execution of owners’ meetings. Recall the mandatory requirements of owners’ meetings.	Level 2: Comprehension Level 1: Knowledge
4.3 Execute the administrative requirements of Board of Directors’ meetings.	Explain the roles and responsibilities of a condominium manager in the execution of Board of Directors’ meetings. Recall the mandatory requirements of Board of Directors’ meetings.	Level 2: Comprehension Level 1: Knowledge
7.1 Ensure required notices and filings are completed in accordance with the applicable legislation.	Describe the legislative requirements for mandatory notices and filings. Explain the roles and responsibilities of a condominium manager in the execution of an owners’ meetings.	Level 2: Comprehension Level 2: Comprehension
7.4 Prepare Status Certificates.	Explain the roles and responsibilities of a condominium manager in the preparation of a Status Certificate. Recall the mandatory requirements of Status Certificates.	Level 2: Comprehension Level 1: Knowledge
7.5 Execute the administrative requirements of the prescribed forms.	Explain the roles and responsibilities of a condominium manager in the administration of prescribed forms. Recall the mandatory requirement of the administration of prescribed forms.	Level 2: Comprehension Level 1: Knowledge

Topic	Content	Format / Examples / Notes	Source Content
<p><i>Meeting facilitation and execution</i></p>	<p>Board Meetings</p> <ul style="list-style-type: none"> • Notices • Agenda and meeting package • Role of the condominium manager at the meeting • Role of the chairperson • Facilitation tips <p>AGM</p> <ul style="list-style-type: none"> • Notices • Agenda and meeting package • Role of the condominium manager at the meeting • Facilitation tips <p>Requisitioned Owners' Meetings</p> <ul style="list-style-type: none"> • Notices • Agenda and meeting package • Role of the condominium manager at the meeting • Facilitation tips <p>Other meetings</p> <ul style="list-style-type: none"> • Turnover meetings • Non-business townhall meetings <p>Virtual Meetings</p> <ul style="list-style-type: none"> • Email decisions • Options for virtual meetings • Virtual meeting tip sheet • Electronic consents 	<p>For each meeting type:</p> <ul style="list-style-type: none"> • Checklist • Example agenda and meeting package • Facilitation tips <p>Virtual meeting tip sheet</p>	<p>Existing course content</p> <p>New content – support resources (checklists, tip sheets)</p>

Condominium Management - Operational Quality > Self-Directed Learning > **Administrative Responsibilities of a Condominium Manager**

Topic	Content	Format / Examples / Notes	Source Content
<i>Developing an effective Manager's report</i>	Key sections and headers Information to include <ul style="list-style-type: none"> • Reporting on action • Update on work completed and in progress • Quotes, recommendations, violations, or incidents • List of current contracts and expiration dates • Table with terms for each director and dates of director training 	Management report template Example of completed template with best practices	New content – template
<i>Certificates and notices</i>	Status Certificates <ul style="list-style-type: none"> • Definition and purpose • Mandatory sections • Process • Sending Status certificates Information Certificates <ul style="list-style-type: none"> • Definition and purpose • Mandatory sections • Process • Updates • Sending information certificates • Exemptions Types of notices <ul style="list-style-type: none"> • Serving notices effectively • Tips for writing notices • Building notices into annual operating plan • Managing and responding to requests for records 	For both certificates: <ul style="list-style-type: none"> • Process map outlining (key steps, timelines, and update triggers) • Checklists • Real-life examples Case study: Implications of an inaccurate Status Certificate	Existing course content New content – process map, checklist, examples, and case study

Topic	Content	Format / Examples / Notes	Source Content
<i>Forms and filing</i>	Types of returns Mandatory information for each type Filing returns Consequences for incorrect filing Registrar database	Checklist for each type Template project plan: Meeting return deadlines Case study: Consequence of an incorrect filing	Existing course content New content – checklist, project plan, and case study

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: Board of Directors and administrative responsibilities tutorial

- Instructor-led tutorial
- Learners submit questions and instructor provides answers during tutorial
- Group exercises:
 - Review Board of Directors’ reflection case studies from self-directed learning
 - Work through instructor-set discussion topics

Solving Issues and Responding to Emergencies

Competencies Addressed	Learning Objectives	Bloom's Taxonomy Level
1.3 Apply sound and practical judgment in daily matters.	Identify techniques to support problem solving and decision-making. Explain how problem-solving and decision-making techniques can be applied in condominium management.	Level 2: Comprehension Level 2: Comprehension
4.16 Implement and update the Fire Safety Plan.	Explain the requirements for the Fire Safety Plan. Describe the process for updating the Fire Safety Plan.	Level 2: Comprehension Level 2: Comprehension
4.19 Assist in the development and implementation of emergency procedures.	Recognize the emergency procedures required by a condominium corporation. Explain the roles and responsibilities of a condominium manager in the development and implementation of emergency procedures.	Level 1: Knowledge Level 2: Comprehension
4.22 Analyze, prioritize, and address issues.	Identify techniques to analyze, prioritize, and address issues within a condominium.	Level 2: Comprehension

Topic	Content	Format / Examples / Notes	Source Content
<i>Problem solving and decision making</i>	Detailed overview of problem-solving and decision-making techniques <ul style="list-style-type: none"> • Cause and effect • Five whys • FOCUS technique Tips for making decisions in an emergency	Examples: Worked examples showing how the techniques can be used in a condominium setting	New content

Topic	Content	Format / Examples / Notes	Source Content
<i>Emergency procedures</i>	Roles and responsibilities of a condominium manager for developing, updating, and implementing emergency procedures Best practice emergency procedures for condominiums <ul style="list-style-type: none"> • Fire Safety Plan • Evacuation Plan • Death or serious injury • Utility shutdowns (long term and short term) • Dealing with media • Conducting effective fire drills Keeping procedures up to date Working with the authorities	Examples: Annotated best-practice examples of each plan	New content
<i>Ensuring continuity</i>	Roles and responsibilities of a condominium manager for developing, updating, and implementing continuity plans	Examples: Annotated best-practice examples of each plan Case study: Condominium manager who responded effectively to the COVID-19 pandemic <ul style="list-style-type: none"> • What preparation, skills, and behaviours contributed to their success. 	New content
<i>Complaints, discipline, and appeals</i>	Overview of the complaints process Bodies involved in the complaints process Common complaints made against condominium managers What to do if a complaint is made about you	Case study: End-to-end complaints process	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.

Condominium Transitions

Competencies Addressed	Learning Objectives	Bloom’s Taxonomy Level
7.2 Support the transition of the condominium corporation from one management provider to another.	Explain the roles and responsibilities of an incumbent condominium manager in the transition of a condominium corporation. Explain the roles and responsibilities of an incoming condominium manager in the transition of a condominium corporation.	Level 2: Comprehension Level 2: Comprehension

Topic	Content	Format / Examples / Notes	Source Content
<i>Management company transitions</i>	Overview of transition process Implications and consequences of a poorly managed transition Roles and responsibilities of incumbent condominium manager <ul style="list-style-type: none"> • Documentation and record keeping • Handover process Roles and responsibility of incoming condominium manager <ul style="list-style-type: none"> • Ensuring all documentation is up to date • Updating policies and plans • Reviewing budget Identifying mismanagement by a previous manager <ul style="list-style-type: none"> • Ethics issues • Notifying the Board • Reporting 	Checklist for tasks of incumbent and incoming condominium manager Case study: Consequences of a poorly managed transition Case study: Process followed by incumbent manager who identifies previous mismanagement	New content

Topic	Content	Format / Examples / Notes	Source Content
<i>Turnover process</i>	Overview of the turnover process Implications and consequences of a poorly managed turnover Roles and responsibilities of condominium manager during turnover <ul style="list-style-type: none"> • Tendering for contracts • Hiring in-house staff • Health and safety requirements • Reporting and following up on outstanding items Identifying mismanagement by Developer <ul style="list-style-type: none"> • Ethics issues • Notifying the Board • Reporting 	Checklist for managing turnovers Case study: Consequences of a poorly managed transition Case study: Manager who identifies issue with developer and how they handled it	Existing course content New content – checklist and case study

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: Board of Directors and administrative responsibilities tutorial

- Instructor-led tutorial
- Learners submit questions and instructor provides answers during tutorial
- Group exercise: Work through discussion topics set by instructor on:
 - Impact of COVID-19 pandemic on the requirements for emergency planning
 - Applying organization and planning content to condominium transitions

Managing Relationships within Condominiums

Competencies Addressed	Learning Objectives	Bloom's Taxonomy Level
1.1 Engage in collaboration and teamwork in the delivery of management services.	Identify the best approach to encourage collaboration and teamwork when working with the Board of Directors.	Level 2: Comprehension
1.4 Apply strategies to resolve conflict.	Identify the best strategy to resolve conflict in situations involving the Board of Directors and staff.	Level 2: Comprehension
4.20 Manage staff employment and performance.	<p>Recall the mandatory policies and processes that are required for managing staff.</p> <p>Explain the role of the manager in managing condominium staff.</p> <p>Describe the people skills required to effectively manage staff employment and performance.</p>	<p>Level 1: Knowledge</p> <p>Level 2: Comprehension</p> <p>Level 2: Comprehension</p>

Topic	Content	Format / Examples / Notes	Source Content
<i>Relationships with Board of Directors</i>	<p>Establishing trust relationship with Board of Directors</p> <p>Addressing conflicts</p>	Exercises: "What would you do?" scenarios involving the Board of Directors	New content

Topic	Content	Format / Examples / Notes	Source Content
<i>Managing staff</i>	<p>Legal obligations</p> <ul style="list-style-type: none"> • Employment Standards • Human Rights • AODA • Health & Safety • Workplace Safety Insurance • Personal Protection Equipment • Recruiting staff • Employment checks • Ensuring appropriate licensing • Job Descriptions and Contracts • Pay • Benefits • Maintaining training records • Record of Employment Certificates • Other key employment documentation <p>People skills</p> <ul style="list-style-type: none"> • Leading a team • Coaching team members • Managing performance • Dealing with issues 	<p>Examples and templates for key employment documents</p> <p>Exercises: “What would you do?” scenarios involving staff</p>	<p>Existing course content</p> <p>New content – scenarios</p>

Ensuring Administrative Quality

Competencies Addressed	Learning Objectives	Bloom’s Taxonomy Level
1.2 Manage time and workload to meet the contractual obligations of the Condominium Management Agreement.	Use project management techniques to manage time and workload and ensure delivery of annual tasks required by the Condominium Management Agreement.	Level 3: Application
4.2 Execute the administrative requirements of owners’ meetings.	Practice the role of the condominium manager in the execution of an Annual General Meeting.	Level 3: Application
4.3 Execute the administrative requirements of Board of Directors’ meetings.	Practice the role of the condominium manager in the execution of a Board of Directors meeting.	Level 3: Application
7.2 Support the transition of the condominium corporation from one management provider to another.	Apply project management techniques to the process for preparing for a transition of a condominium corporation from one management provider to another. Identify the documents that are required to support the transition of a condominium corporation from one management provider to another.	Level 3: Application Level 2: Knowledge

Topic	Content	Format / Examples / Notes	Source Content
<i>Executing successful projects</i>	Project management processes to identify milestones and critical success path <ul style="list-style-type: none"> • Identifying milestones • Time and effort calculations • Potential bottlenecks • Contingency planning 	Individual exercise: Take one mandatory annual activity (e.g., AGM, Audit, etc.) and use the discussed project management techniques to create a plan that can be inputted into the Annual Operating Plan	New content
<i>Executing successful Board meetings</i>	Mock board meeting bringing together the requirements for the administration and facilitation of a meeting	Exercise: <ul style="list-style-type: none"> • Develop Board Meeting agenda • Develop management report • Create papers package • Role play the Board Meeting as a group 	New content
<i>Executing successful AGMs</i>	Mock AGM bringing together all the requirements for the administration and facilitation of a meeting	Exercise: <ul style="list-style-type: none"> • Develop AGM agenda • Create papers package • Role play the AGM as a group 	New content

Topic	Content	Format / Examples / Notes	Source Content
<p><i>Executing management company transitions</i></p>	<p>Overview of all the tasks involved in the transition</p> <p>Preparation for the tasks</p> <p>Identifying what is missing as an incoming condominium manager</p>	<p>Group discussion: Prioritizing the tasks for an incumbent. What are the most important tasks to complete? Which will be the most challenging? Which have the longest lead time?</p> <p>Exercise: Use the prioritization outputs to create a project plan for creating the transition package</p> <p>Exercise: Provided with a transition package, review the contents and identify what is missing and what requires further clarification</p>	<p>New content</p>

Responding to Emergencies

Competencies Addressed	Learning Objectives	Bloom's Taxonomy Level
4.12 Coordinate ongoing development and implementation of standard operating procedures.	Explain the stages involved in developing standard operating procedures.	Level 2: Comprehension
4.14 Support the insurance claims process.	Identify strategic approaches to insurance claims.	Level 2: Comprehension
4.15 Support the insurance appraisal and renewal process.	Explain the insurance claims and deductibles process. Explain the insurance appraisal and renewal process.	Level 2: Comprehension Level 2: Comprehension
4.19 Assist in the development and implementation of emergency procedures.	Describe the role of a condominium manager in emergency scenarios.	Level 2: Comprehension

Topic	Content	Format / Examples / Notes	Source Content
<i>Developing Standard Operating Procedures</i>	Stages in developing Standard Operating Procedures Examples of Standard Operating Procedures	Exercise: Review the procedures for an example condominium: <ul style="list-style-type: none"> Identify the missing procedures Create a draft for one of the missing procedures 	Existing course content New content – exercise
<i>Addressing emergency situations</i>	What to do in an emergency? Common emergencies experienced in condominiums Common mistakes and challenges when dealing with emergency situations Overview of infrequent but serious emergencies Where to find additional support	Exercise: “What would you do?” discussion for emergency scenarios	New content

Condominium Management - Operational Quality Course Blueprint > Instructor-Led Classroom Sessions > **Responding to Emergencies**

Topic	Content	Format / Examples Notes	Source Content
<i>Managing insurance claims</i>	Insurance appraisal and renewal process Common insurance claims Insurance-claims process Corporation versus owner insurance Deductibles <ul style="list-style-type: none"> • When and when not to claim • Notifications to insurance 	Case studies: Complex insurance claims, group discussion about what should be claimed by building versus owners Exercise: Provided with insurance policy and list of claims (ranging from small to large claims), decide whether a claim should be made or not	Existing course content New content – exercise



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