



Competency Profile for Condominium Managers in Ontario (DRAFT - 2019)

Background

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

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

The Competency Profile is used for many purposes, including but not limited to:

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

Development

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

The Context of New General License Condominium Managers

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



and determine when they require consultation. They realize the importance of identifying what they know and do not know, what their learning gaps may be, and how and where to access available resources. They display initiative, confidence, and self-awareness in taking responsibility for their decisions and actions.

Overarching Principles

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

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

Structure

There is a total of 81 competencies grouped thematically under three domains and nine headings:

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

Bolded terms are defined in the Glossary.



CMRAO Competencies – DRAFT

A. Foundational

Condominium Managers have a strong foundation in building and maintaining relationships with stakeholders using effective communication strategies and critical thinking to enhance condominium living.

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

B. Management

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

Subheading	Competency
Physical Building	3.1 Apply knowledge of building systems in the management of properties .
	3.2 Conduct general inspections of the property to identify maintenance and repair requirements.
	3.3 Manage inspections, testing, maintenance, repair and replacement obligations of the condominium corporation.
	3.4 Explain the requirements and process of the Reserve Fund Study .



Subheading	Competency
	3.5 Assist in the development and implementation of the Reserve Fund Study .
	3.6 Explain the legal requirement and process of the Performance Audit .
	3.7 Advise the Board of Directors on the warranty process for new condominiums.
Operations	4.1 Develop, implement and update the condominium corporation's annual operating plan .
	4.2 Execute the administrative requirements of owner's meetings.
	4.3 Execute the administrative requirements of Board of Directors' meetings.
	4.4 Support the Board of Directors to align decisions or policies with governing documents and legislation.
	4.5 Follow established procedures for addressing violations to governing documents in a consistent and equitable manner.
	4.6 Advise the Board of Directors in making informed decisions in the best interest of condominium corporation.
	4.7 Analyze and present quotations and contracts to the Board of Directors to allow for effective decisions.
	4.8 Administer contracts on behalf of the condominium corporation.
	4.9 Implement chargebacks to unit owner's accounts in accordance with the Condominium Act.
	4.10 Manage cost sharing agreements .
	4.11 Adhere to contractual obligations of condominium management agreements.
	4.12 Coordinate ongoing development and implementation of standard operating procedures .
	4.13 Understand the principles of, and explain the requirements of insurance.
	4.14 Support the insurance claims process.
	4.15 Support the insurance appraisal and renewal process.
	4.16 Implement and update the Fire Safety Plan .
	4.17 Manage health and safety compliance requirements.
	4.18 Recognize, act on, and report actual and potential workplace and occupational safety risks.
	4.19 Apply risk management concepts.
	4.20 Assist in development and implementation of emergency procedures.
	4.21 Manage staff employment and performance.
	4.22 Coordinate projects to achieve desired outcomes.
	4.23 Analyze, prioritize and address issues.
	4.24 Supervise vendors and monitor performance.
Legal	5.1 Integrate knowledge of the legal and regulatory framework in which a condominium operates into management activities.
	5.2 Understand hierarchy of documents governing condominiums in Ontario.



Subheading	Competency
	5.3 Apply the Human Rights Code ¹ to all management activities.
	5.4 Assist legal processes to protect the interests of the condominium corporation.
	5.5 Apply the agency relationship between the licensee and the condominium corporation.
	5.6 Adhere to legal trust requirements related to condominium funds to ensure the assets of the corporation are protected.
	5.7 Maintain awareness of the Condominium Authority Tribunal ² process.
	5.8 Apply the Condominium Act (1998) ³ to all management activities.
Financial	6.1 Prepare, present and implement the annual budgets.
	6.2 Collect the common expenses.
	6.3 Interpret financial statements and explain variances to the Board of Directors to enable informed decisions.
	6.4 Monitor financial status and report concerns to the Board of Directors.
	6.5 Monitor Reserve Fund spending and balance relative to the Reserve Fund Study .
	6.6 Support the Board of Directors in the Reserve Fund investment process.
	6.7 Support the annual financial audit process.
	6.8 Review general ledger to ensure accurate expense reporting.
	6.9 Implement the financial controls to protect the condominium corporation’s financial assets.
Information	7.1 Ensure required notices and filings are completed in accordance with the applicable legislation.
	7.2 Support the transition of the condominium corporation from one management provider to another.
	7.3 Manage client records in accordance with applicable legislation.
	7.4 Prepare Status Certificates .
	7.5 Execute the administrative requirements of the prescribed forms .

C. Professional

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

¹ The Ontario Human Rights Code: <http://www.ohrc.on.ca/en/ontario-human-rights-code>

² The Condominium Authority Tribunal: <https://www.condoauthorityontario.ca/en-US/tribunal/the-cat-process/>

³ Condominium Act: <https://www.ontario.ca/laws/statute/98c19>



Subheading	Competency
Ethics	8.1 Comply with the Code of Ethics ⁴ regulation made under the Condominium Management Services Act ⁵ .
	8.2 Demonstrate honesty and integrity when offering or providing condominium management services.
	8.3 Provide reasonable accommodation for persons with disabilities.
	8.4 Establish and maintain professional boundaries .
	8.5 Recognize limits of personal expertise and professional responsibilities and obtain expert support as deemed necessary by the Board of Directors.
	8.6 Recognize and disclose real and perceived conflicts of interest .
	8.7 Recognize and act in the best interest of the condominium corporation.
	8.8 Demonstrate accountability and accepts responsibility.
	8.9 Recognize, act on, and report harmful incidents to the appropriate authority.
	8.10 Administer the requirements of the governing documents in a fair and consistent manner.
Lifelong Learning	9.1 Maintain awareness of social, environmental, technological and other trends that may affect the management of condominiums.
	9.2 Enhance professional knowledge and skills on a regular basis.
	9.3 Maintain awareness of emerging relevant and applicable legislation.
	9.4 Integrate continuous improvement principles and activities into the delivery of condominium management services.

⁴ Code of Ethics: <https://www.ontario.ca/laws/regulation/180003>

⁵ Condominium Management Services Act: <https://www.ontario.ca/laws/statute/15c28>



Glossary

Glossary Term	Definition
Active listening	The act of mindfully hearing and attempting to comprehend the meaning of words spoken by another in a conversation or speech.
Annual operating plan	Planned activities for the fiscal year for non-daily or weekly items. It would include items that occur monthly or less frequently and is usually displayed in a monthly calendar type of format. Includes all maintenance and administrative items as well as capital projects for the year.
Building systems	Building systems are the critical systems of your facility, such as the Electrical, HVAC, Security, Life Safety, Lighting, Utilities, Telecom, and Energy Management. These systems are rarely, if ever, independent entities; rather, they depend on each other to operate.
Conflicts of interest	These can be financial or ethical. Financial conflicts of interest are material interests either directly or indirectly, in a material contract or transaction to which the condominium corporation is a party. There is a legal requirement to report financial conflicts of interest. It is best practice to report ethical conflicts of interest.
Cost sharing agreements	Refers to an agreement between a Condominium Corporation and one or more persons or parties or any combination of them, in which they share in the provision, use, maintenance, repair, insurance, operations or administration of any land, any part of a property or proposed property, any assets of a corporation or any facilities or services.
Fire safety plan	A plan to assist with the effective use of fire safety systems, equipment, personnel and processes to protect occupants of a building from fire. The plan must be reviewed annually.
Governing documents	The Condominium Act, the declaration, the by-laws, the condominium description, the rules and policies that govern a condominium corporation.
Harmful incidents	A client or staff safety incident resulting in harm to the client or staff member. This can be physical, mental, emotional or financial harm.
Hierarchy of documents	<p>The setup and governance of condominiums in Ontario can be found in four documents:</p> <ul style="list-style-type: none"> • The Condominium Act 1998 • The condominium declaration • The condominium by-laws • The condominium rules <p>The provisions of any of these documents cannot be inconsistent or contradict the provisions of a document above it. For instance, the declaration cannot contradict The Condominium Act 1998, but it has precedence over the by-laws and the rules. Similarly, when a board adopts a new by-law or a new set of rules, these cannot be inconsistent with the Condominium Act or with the Declaration.</p>



Glossary Term	Definition
Performance audit	A performance audit is a required assessment, conducted by a licensed professional, of the condominium corporation to determine any structural, functional, or cosmetic defects. Such defects are warranted by Tarion. There are specific timelines for each of three assessments.
Prescribed forms	Prescribed forms are mandatory forms under the Condominium Act 1998 or the Regulations. Those include but are subject to change: The proxy (s. 52(4)), The table of content of the disclosure statement (s. 72(4)), The status certificate (s. 76(1)), The PICs, ICUs and NOICs (s. 11.1(7); 11.2(4); 11.3(6) of the Regulations), The preliminary notice of meeting of owners (s 12.2 of the Regulations), The notice of meeting of owners (s. 12.8(2)).
Professional boundaries	The point at which the relationship changes from professional to unprofessional and personal. It defines the limit of the professional role. Crossing a boundary means the property manager is misusing power in the relationship or behaving in an unprofessional manner with the client, co-workers or contractors. The misuse of power does not have to be intentional to be considered a boundary crossing.
Professional presence	The demonstration of confidence, integrity, positivity, engagement and empathy that aligns with legislation, practice standards, and ethics through verbal and non-verbal communications.
Property	The land, including the buildings on it, and interests appurtenant to the land, as the land and interests are described in the description and includes all land and interests appurtenant to land that are added to the common elements
Reasonable accommodation	The duty to accommodate is informed by three principles: respect for dignity, individualization, and integration and full participation.
Reserve fund	Money set aside by the condominium corporation from the owners' contribution to the common expenses for the major repair and replacement of the common elements and assets of the corporation.
Reserve fund study	A physical and financial analysis to determine whether the amount of money in the reserve fund and the amount of contributions collected by the corporation are adequate to provide for the expected costs of major repair and replacement of the common elements and assets of the corporation.
Risk management	The identification, evaluation, and prioritization of risks followed by coordinated and economical application of resources to minimize, monitor, and control the probability or impact of unfortunate events or to maximize the realization of opportunities.
Standard operating procedures	Established or prescribed methods to be followed routinely for the performance of designated operations or in designated situations. SOPs ensure consistency and the meeting of standards regardless of who is performing the task or when it is being performed.
Status certificates	A status certificate is a prescribed document that provides required information about the financial status of the condominium corporation and a specific unit. It includes governance documents including Declaration, Bylaws, Rules and information about the Reserve Fund, insurance coverage and any legal proceedings.
Trust requirements	Refers to the obligations of a person receiving money on behalf of or for the benefit of the corporation.