

# Commercial Property and Facilities Management Competency Assessment Framework

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Building Owners and Managers  
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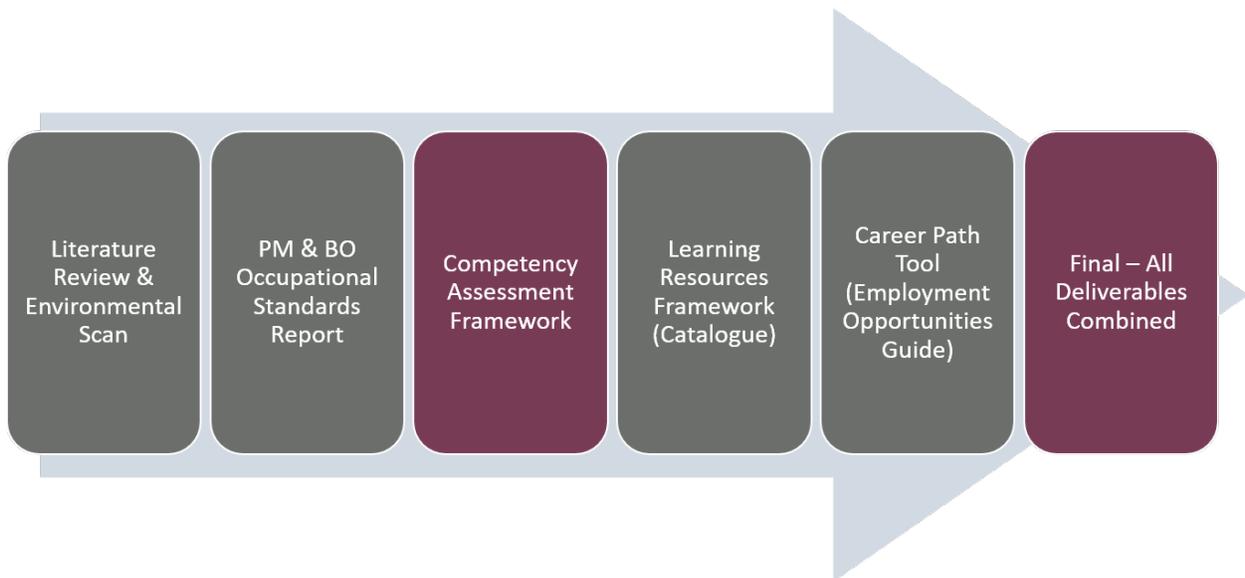
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# TABLE OF CONTENTS

<b>INTRODUCTION .....</b>	<b>3</b>
Development Process .....	4
Performance and Assessment Relationship .....	4
Nature of Competence .....	5
Assessment Instruments to Use .....	8
Assessment Procedure .....	8
<b>COMPETENCY ASSESSMENT FRAMEWORK.....</b>	<b>17</b>
<b>Instruments for Building Operator Competencies.....</b>	<b>18</b>
Duty 1: Provide stewardship of the asset to ensure its longevity and value to the owner and users .....	18
Duty 2: Ensure the safety of operations and people according to technical and occupational standards and regulations .....	22
Duty 3: Work with management to ensure financial stability .....	26
Duty 4: Manage expectations of stakeholders .....	30
Duty 5: Act as ambassador for the organization .....	32
Duty 6: Maintain currency with education and standards .....	34
<b>Instruments for Property Manager Competencies.....</b>	<b>36</b>
Duty 1: Manage an asset’s financial condition in keeping with industry standards and owners’ goals .....	36
Duty 2: Plan and oversee the operation of an asset to meet industry, government, and other standards and regulations while complying with provincial building codes, municipal bylaws, and lease obligations.....	42
Duty 3: Manage and oversee the administration of an asset to maximize/meet the owner’s goals in keeping with industry standards .....	45
Duty 4: Oversee internal and external market relations .....	47
Duty 5: Develop sustainable practices in the operation of the property asset in keeping with local, provincial and national standards, and owner and tenant goals.....	49
<b>APPENDIX .....</b>	<b>52</b>
Principles of Competence.....	52
Assessment Considerations .....	53
Fundamental Instrument Development Guidelines .....	57
Additional Development Guidelines .....	63
Guidelines for Development of Knowledge-Based Instruments .....	64
Guidelines for Developing Skill-Based Instruments .....	73

## INTRODUCTION

This document is the third deliverable of the BOMA BC Sector LMP Phase 4 Project, the Competency Assessment Framework, and a component of the final submission to the Ministry of Advanced Education, Skills and Training.



This deliverable was preceded by the Draft Occupational Standards Report (OSR), which includes competency profiles of the duties, tasks, and competencies associated with the Building Operator (BO) and Property Manager (PM) occupations and recommends a methodology for assessing the competence of existing practitioners. The OSR revealed that standards in the industry are limited and inconsistent, which has resulted in non-standardized education and training and prerequisite experience. This had been confirmed by the Literature Review and Environmental Scan that preceded the OSR.

Standards are necessary to serve several purposes including employment, learning and development, and performance assessment. In terms of performance assessment, the competency profiles for the PM and BO occupations are the standard for employers to guide their assessment of practitioners' performance.

The SLMP Guidelines for Developing Outcomes-Based Competency Standards (Guidelines), which are referenced in the Statement of Work for this project, specify that the development of assessment strategies and tools is the logical step following development of competencies. These tools and strategies are included in the Competency Assessment Framework and can be used to evaluate practitioners' ability to perform their respective occupations to expected standards.

## Development Process

As suggested in the SLMP Guidelines, we developed the Competency Assessment Framework (framework as a natural extension of the competency profiles for the Building Operator (BO) and Property Manager (PM) occupations. The framework is also a natural extension of the standards described in the Occupational Standards Report.

The behaviours listed for each competency in the BO and PM competency profiles were carefully analyzed to indicate criteria or performance indicators, which were then used to identify appropriate tools (instruments) that could be used to assess practitioners' ability to perform the tasks in their respective job function/occupation (see [Appendix – Fundamental Instrument Development Guidelines](#)).

Since competency-based learning and assessment are relatively new in the industry, we felt it prudent to include a description of the competency-assessment process and how it might be implemented by an employer or HR professional. Specifically, in alignment with the SLMP Guidelines, the framework provides a wealth of detail on performance assessment, a description of the principles of competence, and some background theory on the relationship of knowledge and skill to performance and assessment.

The framework was developed as a “living” document, with the understanding that it will evolve as the BO and PM occupations change and as the industry acquires new information.

## Performance and Assessment Relationship

Employers in the industry understand that the best way to ensure that PMs and BOs perform their job functions/occupations accurately and consistently is to provide supports from time to time.

Similarly, employers recognize that when they hire a new PM or BO, they want to ensure that the person they hire is capable of performing the job function/occupation at a minimum acceptable level of competence.

To ensure this, standards have been identified for the PM and BO job functions/occupations (see *Occupational Standards Report*) in terms of competencies to be demonstrated when they perform their roles, and assessments employers can make to determine if PMs and BOs are performing their role accurately and to identify where improvements can be made.

Now that these standards have been codified, assessment takes on new meaning, focus, and process.

Fundamentally, PMs and BOs must be able to perform the duties, tasks, and steps associated with their job functions/occupations according to observable and measurable competencies and behaviours that have been established for those activities.

However, most employers in the industry are used to assessing employees according to criteria based on traditional human resources performance and job-specific norms. In addition, their criteria are often company specific.

Important as these criteria are, the adoption of competency-based criteria places the focus of assessment on performing the duties and tasks of a role competently. Thus, PMs and BOs will be expected to be able to perform both the traditional tasks and competency-based tasks. This represents a shift in focus for assessment.

This standard and the concept of competency-based learning and assessment are new in the industry. There are many types of employment for BOs and PMs, and not all employers have the same background and experience in performance assessment.

This Competency Assessment Framework was developed to provide direction and guidelines for employers so that they can begin to hire, assess, and support PMs and BOs in an effort to ensure their continued competence.

Following are detailed descriptions of:

- Nature of Competency
- Assessment Instruments to Use
- Assessment Procedure

## Nature of Competence

As described in the Occupational Standards Report, it's important to recognize that competence does not simply exist – it is developed as shown in the table below.

Aspect	Description
Competence occurs over time.	> A person develops competence by performing the task(s) over time with increasingly limited supervision until they are able to consistently perform them without direction or supervision.
Competence is demonstrated by repetition.	> A person develops competence by performing tasks several times in the real, practical work setting under various conditions.
Competence is grown.	> A person grows competency by performing tasks, assisted by access to: <ul style="list-style-type: none"> <li>&gt; Learning opportunities</li> <li>&gt; Expert help</li> <li>&gt; Support from management</li> <li>&gt; Continuous practice</li> </ul>

It's also important to remember the nature of competence:

- It is comprises knowledge and skill, which are different.
- Knowledge drives the development of skill.
- Competence is the application of knowledge and skill to perform a task or set of tasks.

## Knowledge

Knowledge is **not** observable. Therefore, to assess knowledge, a person must perform an activity that accurately indicates they can recall information (facts, figures, rules, formulas, procedures, etc.) from memory and apply it (in a formula, process, etc.).

Consequently, the usual way to assess knowledge is to specify a subject associated with a task or set of tasks to be performed, ask the person to recall it by performing either an oral or a written activity (see [Knowledge-Based Assessment Instruments](#)) and examine the result.

## Skill

Skill **is** observable, and there are many different types of skill. To assess skill, a person must demonstrate a practical activity (performance) that accurately indicates they can apply appropriate knowledge to:

- Perform an action or activity according to a procedure;
- Engage in a human interaction while exhibiting certain behaviours of a prescribed protocol, or
- Produce a product that exhibits specific features.

The usual way to assess skill is to specify an activity associated with a task or set of tasks to be performed, ask someone to perform it, and observe them doing it (see [Skill-Based Assessment Instruments](#)).

When the time comes to determine whether a practitioner in the workplace is competent, you need to be able to observe and measure whether they can successfully perform a practical activity (task or set of tasks) associated with their job function/occupation.

More specifically, you need to determine **if** a person can perform a task or set of tasks, and **how well** they can do it. The table on the next page shows what needs to be included in an assessment to determine both.

Consideration	In a competency-based assessment system ...
To determine <b>if</b> a person can perform a task(s)	Their performance must be observed and measured according to a set of criteria: <ul style="list-style-type: none"> <li>▪ The duties, tasks, and steps that the job function/occupation comprises</li> <li>▪ The competencies that define how a task(s) is performed</li> <li>▪ The behaviours associated with the competencies specified for a task(s)</li> </ul>
To determine <b>how well</b> a person can perform a task(s)	Their performance must be measured against an established minimum acceptable level of competence that includes their ability to perform the task(s): <ul style="list-style-type: none"> <li>▪ Several times</li> <li>▪ In the correct order</li> <li>▪ Within a specified timeframe</li> </ul>
To conduct the assessment	The task(s) must be performed when: <ul style="list-style-type: none"> <li>▪ The person has had time to become familiar with the job function and working environment</li> <li>▪ The person is prepared for the assessment (has been informed of the purpose, requirements etc.)               <ul style="list-style-type: none"> <li>&gt; The place where the assessment is conducted is the real, or accurately simulated, working environment</li> </ul> </li> </ul>

Regarding the minimum competence level for PMs and BOs, it is important to recognize that:

- The industry has not yet set a minimum level of competence.
- If the industry establishes formal learning and certification, this will be one of the important outcomes.

Until minimum standards of competence and formal learning/certification are in place, the commonly accepted practice of setting 75 per cent as a pass score for assessment ratings is recommended.

- This would be the minimum requirement for hiring and for early performance on the job.
- Then, as a practitioner increases in competence through practice on the job, their score would increase respectively. Some employers call this the “road to mastery” or “path to proficiency.”

## Assessment Instruments to Use

Competence is based on knowledge and skill. It is important to choose the right instrument to assess competence.

### Knowledge-based assessment instruments

A person's knowledge is assessed using oral or written questions. Common instruments include but are not limited to:

- Competency conversation, administered orally
- Exam, composition, or situation analysis, administered in writing

Examples are shown within this document as well as in the [Appendix](#).

### Skill-based assessment instruments

A person's skill is assessed by having them perform a procedure, engage in a human interaction, or produce a product that is observed and measured. Common instruments include but are not limited to:

- Checklist
- Rating scale
- Rubric

Examples are shown within this document as well as in the [Appendix](#).

## Assessment Procedure

Since competency-based assessment is another standard but is not yet implemented in the industry, employers are encouraged to start following a standard assessment procedure when they want/need to assess a PM or BO's performance. The following seven-step procedure can be used as a guideline.

### Step 1. Identify the person to be assessed

Identify the individual(s) to be assessed and the need for conducting an assessment (there has to be a reason).

Make the decision to assess an individual based on a specific reason, the most common of which include but are not limited to (see [Reasons for Assessment](#)):

- Knowledge
- Service delivery
- Regulatory requirements
- Introduction of new task or revised tasks
- Performance improvement

There are two target populations: incumbent PMs and BOs, and newly hired PMs and BOs.

## 1. Incumbent PMs or BOs

- Although any of the common reasons could drive the need for an assessment, perhaps the most typical reason for the incumbent population is performance improvement.
- People in this population should generally have a relatively high level of competence performing their role.
- If using 75 percent as the minimum, the person being assessed would be expected to obtain a higher score.

## 2. Newly hired PMs or BOs

- Although any of the common reasons could drive the need for an assessment, the most typical reasons for the newly hired population are:
  - > To set a benchmark
  - > Knowledge priority
  - > Service delivery issue
- People in this population should generally have a relatively low level of competence performing their role.
- If using 75 percent as the minimum, the person being assessed would be expected to obtain that score as a minimum.

## Step 2. Specify the need for assessment

Specify what needs to be assessed and the type of assessment (see [Reasons for Assessment](#)).

Specify a task or set of tasks to assess based on the reason for assessment.

Depending on the context in which an assessment is made, such as the conditions in the work environment, regulations or other requirements, employer expectations, etc., decide whether quantitative, qualitative, or both types of assessment should be conducted.

Most circumstances usually indicate that only quantitative assessment is needed, but it is important to avoid defaulting to it.

### Quantitative assessment

- Measures the number of tasks and behaviours a practitioner can perform.
- Is objective, requiring a simple yes/no response.

### Qualitative assessment

- Measures how well a practitioner can perform a task(s) and behaviours according to specific criteria.
- Is subjective, requiring qualifications to limit bias and personal interpretation.
- Requires careful development of criteria and qualifications.
- Takes more time to develop, deliver, and interpret.

### Step 3. Select the instrument(s)

Refer to the Competency Assessment Framework for PMs or BOs (see [Framework for PMs and BOs](#)).

Select the task or set of tasks to be assessed and identify the suggested assessment instrument.

Select the suggested instrument(s).

#### *Property Managers Example 1*

**Duty 2:** Plan and oversee the operation of an asset to meet industry, government, and other standards and regulations while complying with provincial building codes, municipal bylaws, and lease obligations

#### **Task 2.3:** Manage contracts for services

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
<b>Contract management</b>	<ul style="list-style-type: none"><li>▪ Create contracts for services (e.g.: repair, replacement, installation)</li><li>▪ Obtain sign-offs on contracts</li><li>▪ Discuss contractor requirements, schedule, invoicing, payment, etc.</li></ul>	<ul style="list-style-type: none"><li>▪ Checklist</li></ul>
	<ul style="list-style-type: none"><li>▪ Administer contracts and agreements</li></ul>	<ul style="list-style-type: none"><li>▪ Checklist</li></ul>
	<ul style="list-style-type: none"><li>▪ Review ongoing contracts regularly</li></ul>	<ul style="list-style-type: none"><li>▪ Checklist</li></ul>

- Notice that the task and competency are practical (“hands-on”/skill-based). Assessment requires that the PM “perform an action or activity according to a procedure.”
- The framework suggests that a **checklist** is the appropriate instrument to use for all the behaviours involved in this duty/task.
- Because a checklist is suggested for all the behaviours, one single instrument can be developed that includes all of them.

### Property Managers Example 2

*Duty 2: Plan and oversee the operation of an asset to meet industry, government, and other standards and regulations while complying with provincial building codes, municipal bylaws, and lease obligations*

*Task 2.1: Monitor the overall condition of all components of the physical asset*

*Competency: Collaboration and teamwork*

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
<b>Collaboration and teamwork</b>	<ul style="list-style-type: none"><li>▪ Work with building maintenance personnel (e.g., Building Operator) to determine level of involvement in implementation</li><li>▪ Verify that you and building maintenance personnel are aligned on responsibilities</li></ul>	<ul style="list-style-type: none"><li>▪ Competency conversation</li></ul>

- Notice that the task and competency are not practical (they are information-based).
- The framework suggests that a **competency conversation** is the appropriate instrument to use for the behaviour.

### Step 4. Develop the instrument(s)

(See [Development Guidelines](#).)

Note that the instruments suggested in the framework exist in name only. Development of individual instruments falls outside the scope of this project. Until such time as instruments become available, employers are encouraged to create instruments based on the suggestions given.

Note that any applicable attributes (see *Attributes – Occupational Standards Report*) should be included when developing an instrument to assess a task or competency.

## Property Managers Example 2

### Task 2.3: Manage contracts for services

#### Competency: Contract management

Select attributes for PMs and BOs that apply to the task and competency.

Attributes	Selections
Accountability	X
Change management	
Continuous improvement	X
Resiliency	
Self-awareness and confidence	X
Continuous learning and development	X
Emerging technology and information systems	

This is practical (“hands-on”/skill-based) task and competency involving an action performed to produce a product that exhibits specific features. The behaviours and attributes listed for this competency, and the actions to be performed, can be observed in step-by-step manner. Thus, a **checklist** is an appropriate assessment tool.

Here is a rough draft of a checklist that might be developed for this example.

The contract specified:

- Work to be completed
- Timeline
- Deliverables

The contract included evidence of self-awareness and confidence:

- Is focused on the outcome
- Is free of distractions
- Was checked for completeness

The contract represents the PM’s accountability by including statements that:

- Express personal responsibility for the contract’s accuracy
- Promise to manage the owner’s expectations
- Describe contractor requirements, schedule, invoicing, payment, etc.
- The contract was signed by the owner

The contract was administered by:

- Monitoring work done
- Recording completion of deliverables

The PM reviewed the contract by documenting:

- Elements that were completed accurately and in a timely manner
- Areas where improvements could be made
- Filing of the contract
- Reporting to the owner

**Note:** For a complete description of how to develop a checklist and examples of other types of assessment instruments, see the *Appendix – [Fundamental Instrument Development Guidelines](#)*.

### **Property Managers Example 2**

*Task 2.1: Monitor the overall condition of all components of the physical asset*

*Competency: Collaboration and teamwork*

Select attributes for PMs and BOs that apply to the task and competency.

Attributes	Selections
Accountability	X
Change management	
Continuous improvement	
Resiliency	
Self-awareness and confidence	X
Continuous learning and development	
Emerging technology and information systems	

This is a non-practical (knowledge-based) task and competency; therefore, a competency conversation is an appropriate instrument. Based on the behaviours listed for the competency and the selected attributes, questions can be asked to determine if the person knows what facts apply to the competency and task.

Here is a rough draft of a competency conversation that might be developed for this example.

**Purpose:** Assess the PM’s ability to monitor the overall condition of all components of the physical asset.

**Subject:** Background knowledge of who is responsible for monitoring.

**Knowledge will be assessed in terms of the PM’s ability to express how to:**

- Identify who is responsible for monitoring component condition.
- Describe their relationship with personnel responsible for monitoring.
- Describe areas of responsibility alignment.

Questions	Competent	Not Yet Competent
What personnel are responsible for monitoring the overall condition of the components of the asset? Describe the specific personalities of each person.	<input type="checkbox"/>	<input type="checkbox"/>
Describe how your thoughts and attitudes can influence the behavior and actions of these personnel.	<input type="checkbox"/>	<input type="checkbox"/>
How would you demonstrate your openness to the thoughts and opinions of others?	<input type="checkbox"/>	<input type="checkbox"/>
Describe how you can take personal responsibility for the actions of others.	<input type="checkbox"/>	<input type="checkbox"/>
How can you show a clear sense of ownership for your overall responsibility for this task?	<input type="checkbox"/>	<input type="checkbox"/>
How would you verify that you and other personnel are aligned in your responsibilities for monitoring?	<input type="checkbox"/>	<input type="checkbox"/>

**Note:** For a complete description of how to develop a competency conversation and examples of other types of assessment instruments, see the *Appendix – [Fundamental Instrument Development Guidelines](#)*.

## **Step 5. Inform the person being assessed how the assessment will be conducted**

Any form of assessment will be stressful for the person being assessed. Assessments are frequently associated with negative personal feelings that must be accommodated.

Reduce potential stress and avoid confusion by letting people ahead of time what is going to happen, why, when, and under what conditions.

Document and communicate the reason(s) for the assessment to the person being assessed.

Hold a meeting with the individual, ideally in person, to explain:

- The reason for the assessment – e.g., if the reason is a service delivery issue, explain that the same conditions in which the complaint, incident, or accident occurred will be replicated.
- That the assessment is not punitive.
- What will happen with the results (i.e., results are used to identify supports needed).
- The timing of the assessment. It should not be a surprise; it should occur at a reasonable time soon after the need is identified).
- The location of the assessment – e.g., the actual workplace or an accurately simulated workplace.
- Who will be conducting the assessment – the name of the assessor and their qualifications.

Inform the PM or BO what they will be given:

- Access to what is needed to perform the operational requirements of the task(s) being assessed (e.g., equipment, material, reference documents, standards, regulations, etc.).
- Accommodation for special needs if necessary.

Explain how the PM or BO will be assessed:

- They will be asked to complete an assessment instrument.
- Specify whether the instrument can be reviewed and/or tried out for practice before the actual assessment occurs.
- Inform them they will be assessed individually unless the task(s) requires group performance.
- Describe what constitutes successful completion (e.g., if the assessment is marked, what the minimum score is, whether second attempts are allowed, etc.).

## **Step 6. Conduct the assessment**

At the scheduled date and time, the assessor:

- Sets up the environment.
- Ensures the person being assessed is given what they need.
- Administers the instrument(s).

### **Step 7. Interpret the results and follow up if necessary**

- If the assessment involves learning something new (see [Reasons for Assessment](#)), keep in mind that learning alone does not lead to competence.
- Competence is the result of applying learned information and skill to perform a task (see [Nature of Competence](#)).

When conducting assessment for any reason, remember that, to be considered competent, a PM or BO must perform the task(s) several times, in the correct order, with increasingly limited supervision until they are able to consistently perform without direction or supervision, to an acceptable level, within a specified timeframe.

## COMPETENCY ASSESSMENT FRAMEWORK

Competencies consist of the knowledge, skills, abilities and attributes a person needs to successfully perform an occupation. When a practitioner demonstrates competence, they are displaying what they know (knowledge), their expertise (skills), and other qualities (attributes) about performing the occupation.

Competence cannot be demonstrated by a single act; rather, it is shown through collection of evidence related to consistently performing tasks associated with their occupation, which is evaluated in a variety of ways.

In the [appendix](#) of this framework are some important notes to consider about competency-based assessment that inform the selection and development of assessment instruments:

- Principles of competence
- Background theory
- Instruments
- Assessment process

Employers, HR practitioners, or educators who already have experience with conducting assessments may not wish to read about principles of competence or the theory that backgrounds competency assessment. They may already be familiar with assessment instruments and the processes for using them. Nevertheless, they may find the list of instruments and recommended processes beneficial for ensuring that their assessments are accurate and specific to the competencies/tasks they are assessing. They will need to develop the instruments unless they already have such instruments that are specific to their organization and context; the assessment process information may assist them to do so.

Those without an assessment background may find it interesting to read the full [appendix](#) to gain an understanding of the principles of competence and background theory, and also to become familiar with the instruments and recommended assessment processes. This will enable them to determine whether there is a need for assessment, develop the necessary instrument(s), and conduct the assessment.

## INSTRUMENTS FOR BUILDING OPERATOR COMPETENCIES

The BO competency profile lists a total of 25 tasks associated with six duties. Each task is profiled in terms of the competencies and associated behaviours a BO is expected to perform on the job to demonstrate competence in the occupation.

Accordingly, assessment of each task is displayed in terms of suggested knowledge and performance assessment instruments.

It is important to note that the instruments are listed by name only. Each one will have to be developed so they accurately reflect the criteria a BO is expected to meet. See the [development notes](#) that follow.

### Duty 1: Provide stewardship of the asset to ensure its longevity and value to the owner and users

#### Task 1.1 Develop and document preventative maintenance and long-term capital maintenance plans

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
Organization and Time Management	<ul style="list-style-type: none"> <li>Identify actions and situations that could distract from work being done</li> </ul>	<ul style="list-style-type: none"> <li>Competency conversation</li> </ul>
	<ul style="list-style-type: none"> <li>Identify short- and long-term maintenance requirements and capital improvements</li> <li>Determine lead time needed to prepare for work</li> <li>Schedule activities (repair, replace, upgrade) well in advance of when work is needed</li> </ul>	<ul style="list-style-type: none"> <li>Checklist</li> </ul>
Planning and prioritization	<ul style="list-style-type: none"> <li>Exhibit a high level of energy and commitment and be able to manage multiple tasks simultaneously</li> </ul>	<ul style="list-style-type: none"> <li>Competency conversation</li> </ul>
	<ul style="list-style-type: none"> <li>Identify short- and long-term goals to be achieved, and required deadlines</li> <li>Prioritize work to deliver successful results within agreed-upon timeframes</li> <li>Use available resources with maximum efficiency</li> <li>Develop plans for continuous improvement of building operations and maintenance</li> </ul>	<ul style="list-style-type: none"> <li>Checklist</li> </ul>
	<ul style="list-style-type: none"> <li>Conduct a thorough inventory of the asset's on-site equipment, machinery, and systems</li> <li>Identify maintenance tasks for each</li> <li>Classify tasks as urgent vs. routine</li> </ul>	<ul style="list-style-type: none"> <li>Rating scale</li> </ul>
Document management	<ul style="list-style-type: none"> <li>Develop plans for new work</li> <li>Develop plans for ongoing work</li> <li>Update plans in response to situations that interrupt schedules</li> </ul>	<ul style="list-style-type: none"> <li>Checklist</li> </ul>

**Duty 1: Provide stewardship of the asset to ensure its longevity and value to the owner and users**

**Task 1.2 Forecast repairs**

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
Interpersonal relations	<ul style="list-style-type: none"> <li>▪ Obtain input from members of security, janitorial, Property Manager/Owner, etc.</li> <li>▪ Provide information to others in a timely and considerate fashion</li> <li>▪ Conduct all interactions in a cordial manner that indicates respect for others</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
	<ul style="list-style-type: none"> <li>▪ Develop rapport with team members, tenants, and stakeholders in such a way that they feel welcome to provide feedback and information</li> </ul>	<ul style="list-style-type: none"> <li>▪ Rating scale</li> </ul>
Decision making	<ul style="list-style-type: none"> <li>▪ Anticipate equipment, system, and machine longevity</li> <li>▪ Continually evaluate equipment, systems, and parts</li> <li>▪ Estimate costs of repair, replacement, and upgrades</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Planning and prioritization	<ul style="list-style-type: none"> <li>▪ Maintain knowledge of parts/equipment sources and availability</li> <li>▪ Maintain knowledge of contractors, including the repairs they provide and their rates</li> </ul>	<ul style="list-style-type: none"> <li>▪ Composition</li> </ul>
	<ul style="list-style-type: none"> <li>▪ Create an inventory of spare/consumable/often replaced parts on hand for future repairs</li> <li>▪ Monitor the supply and use of parts</li> <li>▪ Take a high-level look at overall issues to plan and organize work to minimize expenditures</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>

**Duty 1: Provide stewardship of the asset to ensure its longevity and value to the owner and users**

**Task 1.3 Manage repairs**

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
Planning and prioritization	<ul style="list-style-type: none"> <li>▪ Create an equipment, machinery, and systems repair plan according to the preventative maintenance and long-term capital maintenance plans</li> <li>▪ Plan repair activities, ensuring fire safety is priority</li> <li>▪ Determine the sequence of maintenance activities according to the criticality of components and cost and budget</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Organization and time management	<ul style="list-style-type: none"> <li>▪ Schedule work (repair, replace, upgrade) according to the preventative maintenance and long-term capital maintenance plans well in advance of when work is needed</li> <li>▪ Develop and communicate timelines for repairs and other work in advance and as it occurs</li> <li>▪ Assign tasks to appropriate workers, contractors, vendors, etc.</li> <li>▪ For unexpected repairs, coordinate timing so as not to interfere with other routine or ongoing work</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Decision making	<ul style="list-style-type: none"> <li>▪ Determine if you can perform repairs or need to contract out the work</li> </ul>	<ul style="list-style-type: none"> <li>▪ Competency conversation</li> </ul>
Contract management	<ul style="list-style-type: none"> <li>▪ Solicit contractors who have the required certification and insurance</li> <li>▪ Explain system issues accurately</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
	<ul style="list-style-type: none"> <li>▪ Obtain quotes</li> <li>▪ Determine whether contractors are quoting correctly</li> <li>▪ Select contractors</li> </ul>	<ul style="list-style-type: none"> <li>▪ Rating scale</li> </ul>
Collaboration and teamwork	<ul style="list-style-type: none"> <li>▪ Conduct tasks that can be self-managed according to the schedule</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
	<ul style="list-style-type: none"> <li>▪ Communicate the schedule with various parties</li> <li>▪ Maintain good rapport with contractors, team members, and stakeholders</li> <li>▪ Verify completion of work</li> </ul>	<ul style="list-style-type: none"> <li>▪ Rating scale</li> </ul>

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
Interpersonal relations	<ul style="list-style-type: none"> <li>▪ Advise authorities as necessary:               <ul style="list-style-type: none"> <li>&gt; Bring to Property Manager/Owner's attention if necessary</li> <li>&gt; Escalate if necessary</li> <li>&gt; Follow up</li> <li>&gt; Notify insurance company when certain work is being performed or systems will be down (e.g., hot flame work, fire systems)</li> </ul> </li> <li>▪ Manage expectations for repairs (timeline, costs, and other considerations)</li> <li>▪ Report completion of work to Property Manager/Owner</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
	<ul style="list-style-type: none"> <li>▪ Interact with others in a way that is respectful and facilitates information sharing</li> </ul>	<ul style="list-style-type: none"> <li>▪ Rating scale</li> </ul>
Document management	<ul style="list-style-type: none"> <li>▪ Document repair work done</li> <li>▪ Maintain a history of equipment, machinery, and systems repair</li> <li>▪ Maintain a repository of contractor information</li> <li>▪ Determine that contractors have correct permits/licences and document accordingly</li> <li>▪ Keep records of communications related to repairs</li> <li>▪ Provide documents to Accounting and other departments or parties per their requirements on a routine or as-needed basis</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>

**Duty 1: Provide stewardship of the asset to ensure its longevity and value to the owner and users**

**Task 1.4 Respond to urgent maintenance requirements**

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
Decision making	<ul style="list-style-type: none"> <li>▪ Assess urgency and associated risk</li> </ul>	<ul style="list-style-type: none"> <li>▪ Rating scale</li> </ul>
	<ul style="list-style-type: none"> <li>▪ Obtain approval from Property Manager/Owner to complete work</li> <li>▪ Identify appropriate resources needed to complete work</li> <li>▪ Determine that contractors have correct permits/licences and document accordingly</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Critical thinking	<ul style="list-style-type: none"> <li>▪ Analyze the situation to determine the required response</li> <li>▪ Identify the most efficient solution</li> </ul>	<ul style="list-style-type: none"> <li>▪ Situation Analysis</li> </ul>

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
Collaboration and teamwork	<ul style="list-style-type: none"> <li>▪ Organize work</li> <li>▪ Communicate the work being done and its impact on tenants/stakeholders</li> <li>▪ Assign tasks to appropriate workers</li> <li>▪ Oversee work</li> <li>▪ Coordinate work being done by multiple contractors or team members</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Document management	<ul style="list-style-type: none"> <li>▪ Document the event</li> <li>▪ Provide documentation to Accounting or other parties per their requirements</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>

## Duty 2: Ensure the safety of operations and people according to technical and occupational standards and regulations

### Task 2.1 Perform various inspections regularly

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
Organization and time management	<ul style="list-style-type: none"> <li>▪ Conduct daily or weekly inspections using rounds sheets</li> <li>▪ Conduct periodic audit inspections of the entire asset's equipment, machinery, and systems</li> <li>▪ Maintain a schedule for inspections of the asset and individual components</li> <li>▪ Coordinate inspections according to insurance requirements and contractor availability if necessary</li> <li>▪ Coordinate inspections with tenants to minimize inconvenience</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Communications	<ul style="list-style-type: none"> <li>▪ Communicate schedules of routine inspections to tenants and contractors</li> <li>▪ Talk with tenants to identify maintenance concerns or issues</li> <li>▪ Communicate inspection findings accurately</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Document management	<ul style="list-style-type: none"> <li>▪ Record results of physical inspections: <ul style="list-style-type: none"> <li>&gt; Potential hazards</li> <li>&gt; Obstructed paths/walkways/fire exits</li> <li>&gt; Sprinkler heads not covered</li> <li>&gt; Maintenance issues</li> <li>&gt; Tenant concerns</li> </ul> </li> <li>▪ Submit reports to Property Manager/Owner</li> <li>▪ Submit reports to regulators as required</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>

**Duty 2: Ensure the safety of operations and people according to technical and occupational standards and regulations**

**Task 2.2 Maintain documents**

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
Communications	<ul style="list-style-type: none"> <li>▪ Check insurance documentation with contractors</li> <li>▪ Supply insurance documentation to Property Manager/Owner and appropriate department(s) as required</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Critical thinking	<ul style="list-style-type: none"> <li>▪ Verify that annual operating permits and Technical Safety BC requirements are up to date</li> <li>▪ Check contractors' insurance documentation to ensure there is appropriate coverage for contracted services</li> <li>▪ Determine when to update SOPs, job aids, and guides, and the level of detail needed</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Document management	<ul style="list-style-type: none"> <li>▪ Use information technology applications to:                             <ul style="list-style-type: none"> <li>&gt; Create Standard Operating Procedures (SOPs) and sign sheets for mechanical rooms</li> <li>&gt; Create job aids/guides/SOPs for regularly used equipment and rooms</li> <li>&gt; Maintain records of inspections</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>

**Duty 2: Ensure the safety of operations and people according to technical and occupational standards and regulations**

**Task 2.3 Provide education and notification**

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
Education and training	<ul style="list-style-type: none"> <li>▪ Inform everyone around you regarding safety:                             <ul style="list-style-type: none"> <li>&gt; Post signage</li> <li>&gt; Conduct fire safety drills</li> <li>&gt; Conduct one-on-one conversations with tenants, staff, and contractors</li> </ul> </li> <li>▪ Stay up to date on annual training</li> <li>▪ Proactively seek out training that is relevant to safety</li> <li>▪ Recommend relevant training to tenants, staff, and contractors</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Interpersonal relations	<ul style="list-style-type: none"> <li>▪ Participate in planning teams</li> <li>▪ Exchange information with contractors regarding standards and regulations</li> <li>▪ Advise tenants when training or drills will have an impact on them</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>

**Duty 2: Ensure the safety of operations and people according to technical and occupational standards and regulations**

**Task 2.4 Participate in committees**

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
Decision making	<ul style="list-style-type: none"> <li>▪ Determine the need for committees if you are a leader</li> <li>▪ Determine information and the correct level of detail to share at committees</li> </ul>	<ul style="list-style-type: none"> <li>▪ Competency conversation</li> </ul>
Planning and prioritization	<ul style="list-style-type: none"> <li>▪ Identify resources required to maintain committees</li> <li>▪ Establish committees</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Interpersonal relations	<ul style="list-style-type: none"> <li>▪ Participate in committees:                             <ul style="list-style-type: none"> <li>&gt; Represent workers if you are a leader</li> <li>&gt; Contribute input and feedback</li> <li>&gt; Share information</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▪ Rating scale</li> </ul>
Communications	<ul style="list-style-type: none"> <li>▪ Use computer-based technology to develop and circulate agendas for committees if you are a leader</li> <li>▪ Receive minutes and provide feedback</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>

**Duty 2: Ensure the safety of operations and people according to technical and occupational standards and regulations**

**Task 2.5 Conduct risk assessments**

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
Decision making	<ul style="list-style-type: none"> <li>▪ Identify operations and activities that present or have the potential for risk</li> <li>▪ Determine requirements:                             <ul style="list-style-type: none"> <li>&gt; Legal</li> <li>&gt; Company</li> <li>&gt; Other</li> </ul> </li> <li>▪ Determine which assessments can be conducted in-house vs. contracted out</li> </ul>	<ul style="list-style-type: none"> <li>▪ Situation Analysis</li> </ul>
Planning and prioritization	<ul style="list-style-type: none"> <li>▪ Prepare a plan for assessing each risk and inspection activity according to existing work conditions and time availability</li> <li>▪ Plan education events and notifications according to the availability of the participants to yield maximum attendance</li> <li>▪ Prepare a schedule for conducting assessments and inspections</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
Organization and time management	<ul style="list-style-type: none"> <li>▪ Conduct assessments according to the schedule</li> <li>▪ Manage the implementation of assessments and inspections to yield the best allocation of workers' time</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>

**Duty 2: Ensure the safety of operations and people according to technical and occupational standards and regulations**

**Task 2.6 Manage personal safety of various stakeholders**

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
Decision making	<ul style="list-style-type: none"> <li>▪ Determine safe work protocols to be followed by contractors and staff</li> <li>▪ Use a preferred vendor list of approved contractors</li> <li>▪ Check that tenants are using insured contractors if they are doing the contracting</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Contract management	<ul style="list-style-type: none"> <li>▪ Ensure contractors have documentation/insurance</li> <li>▪ Monitor the work</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Interpersonal relations	<ul style="list-style-type: none"> <li>▪ Follow safe work protocols for staff: <ul style="list-style-type: none"> <li>&gt; Communicate with team(s)</li> <li>&gt; Use location tracking</li> <li>&gt; Log in and out of work areas</li> <li>&gt; Use appropriate PPE</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Communications	<ul style="list-style-type: none"> <li>▪ Communicate effectively with team(s) about following safe work protocols</li> <li>▪ Update management with safety requirements regularly</li> </ul>	<ul style="list-style-type: none"> <li>▪ Rating scale</li> </ul>
Document management	<ul style="list-style-type: none"> <li>▪ Review existing policies (e.g.: confined space)</li> <li>▪ Update requirements annually</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>

**Duty 2: Ensure the safety of operations and people according to technical and occupational standards and regulations**

**Task 2.7 Maintain asset safety plans**

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
Critical thinking	<ul style="list-style-type: none"> <li>▪ Create and review safety and emergency plans according to the type of building, its age, and other factors</li> <li>▪ Stay current on regulations</li> <li>▪ Be aware of insurance requirements</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Communications	<ul style="list-style-type: none"> <li>▪ Notify insurance company when certain work is being performed or systems will be down (e.g., hot flame work, fire systems)</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
	<ul style="list-style-type: none"> <li>▪ Notify tenants when work will impact them or there is a safety concern</li> <li>▪ Communicate safety plans to employees if you are a leader</li> </ul>	
Document management	<ul style="list-style-type: none"> <li>▪ Use information technology applications to update safety plans and report to Property Manager/Owner</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>

## Duty 3: Work with management to ensure financial stability

### Task 3.1 Establish maintenance, repair and replacement costs

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
Decision making	<ul style="list-style-type: none"> <li>▪ Determine lead time needed to do repairs or get replacement equipment</li> <li>▪ Determine what spare parts need stocking and whether there is adequate storage for them</li> <li>▪ Assess contractor rates and whether they are fair</li> <li>▪ Read leases to determine whether repairs/modifications can be done and what tenants can reasonably request</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Organization and time management	<ul style="list-style-type: none"> <li>▪ Review inspection results to identify: <ul style="list-style-type: none"> <li>&gt; Data</li> <li>&gt; Trends</li> <li>&gt; Scheduled maintenance</li> </ul> </li> <li>▪ Review insurance requirements</li> <li>▪ Cost out/get quotes for repairs, replacement equipment, and spare parts</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Planning and prioritization	<ul style="list-style-type: none"> <li>▪ Track age of equipment and determine how soon and at what intervals it will need to be repaired or replaced</li> <li>▪ Prepare cost statement for repair, maintenance, and replacement</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Education and training	<ul style="list-style-type: none"> <li>▪ Take training related to sustainability</li> <li>▪ Take training related to efficiency</li> <li>▪ Read industry publications and attend industry events</li> </ul>	<ul style="list-style-type: none"> <li>▪ Competency conversation</li> </ul>
Collaboration and teamwork	<ul style="list-style-type: none"> <li>▪ Participate in budget meetings with Property Manager/Owner and stakeholders</li> <li>▪ Provide input as to equipment age, longevity, and time to repair</li> </ul>	<ul style="list-style-type: none"> <li>▪ Rating scale</li> </ul>

### Duty 3: Work with management to ensure financial stability

#### Task 3.2 Develop operating and capital budgets

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
Critical thinking	<ul style="list-style-type: none"> <li>▪ Identify the life cycle of the asset and major component systems:               <ul style="list-style-type: none"> <li>&gt; Age</li> <li>&gt; Type (building, retail/open air property, light industrial facility and buildings, mixed-use property)</li> <li>&gt; Rating</li> <li>&gt; Other</li> </ul> </li> <li>▪ Determine capital implications (upgrade, replace)</li> <li>▪ Review the inventory of the asset's equipment, machinery, and systems and their associated service lifecycles and required maintenance schedules</li> <li>▪ Determine operational implications (repair, replace)</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Decision making	<ul style="list-style-type: none"> <li>▪ Review the long-term goals for the asset</li> <li>▪ Review inspection results:               <ul style="list-style-type: none"> <li>&gt; Assess their condition</li> <li>&gt; Compare to warranty terms and expiration dates</li> </ul> </li> <li>▪ Make recommendations based on observations for improvement opportunities</li> </ul>	<ul style="list-style-type: none"> <li>▪ Composition</li> </ul>
Planning and prioritization	<ul style="list-style-type: none"> <li>▪ Develop operating budget</li> <li>▪ Develop capital budget</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>

### Duty 3: Work with management to ensure financial stability

#### Task 3.3 Prioritize critical components and safety

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
Decision making	<ul style="list-style-type: none"> <li>▪ Examine budget components</li> <li>▪ Separate operational and capital components</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Planning and prioritization	<ul style="list-style-type: none"> <li>▪ Determine the order of conducting maintenance:                             <ul style="list-style-type: none"> <li>&gt; Think holistically</li> <li>&gt; Identify critical components</li> <li>&gt; Consider safety</li> </ul> </li> <li>▪ Prioritize the order of conducting maintenance:                             <ul style="list-style-type: none"> <li>&gt; Determine what must be done right away vs. later</li> <li>&gt; Avoid having too many repairs or replacements to do at once</li> <li>&gt; Set fire safety as top priority</li> <li>&gt; Organize tasks by in-house or contracted out</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Project management <i>Note: Not all BOs conduct capital construction projects. For those that do, this competency is conducted.</i>	<ul style="list-style-type: none"> <li>▪ Prepare a project plan for capital components:                             <ul style="list-style-type: none"> <li>&gt; Consider how one job affects another</li> <li>&gt; Coordinate timing</li> <li>&gt; Notify tenants of impacts</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Document management	<ul style="list-style-type: none"> <li>▪ Complete documents/paperwork (e.g.: fire extinguishers, sprinkler system, flow switches work when system restarts, etc.)</li> <li>▪ Read leases to understand tenants' responsibilities</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>

### Duty 3: Work with management to ensure financial stability

#### Task 3.4 Monitor performance against budget

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
Decision making	<ul style="list-style-type: none"> <li>▪ Track equipment performance over time to determine trends</li> <li>▪ Identify areas for savings (lights, green equipment, pieces of equipment working against each other, etc.)</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Contract management	<ul style="list-style-type: none"> <li>▪ Measure actual costs against estimates:                             <ul style="list-style-type: none"> <li>&gt; Compare contractor quotes to assess whether they are fair</li> <li>&gt; Assess contractor work for quality against expense</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▪ Rating scale</li> </ul>

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
Organization and Time Management	<ul style="list-style-type: none"> <li>▪ Ensure tasks are performed</li> <li>▪ Notify insurer</li> <li>▪ Communicate opportunities for efficiency/sustainability to Property Manager/Owner</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Document management	<ul style="list-style-type: none"> <li>▪ Submit report to Property Manager/Owner</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>

### Duty 3: Work with management to ensure financial stability

#### Task 3.5 Collaborate in budget reviews

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
Critical thinking	<ul style="list-style-type: none"> <li>▪ Group jobs to minimize expenditures over the year</li> <li>▪ Work with Property Manager/Owner to schedule jobs to allocate spending in keeping with available funds</li> </ul>	<ul style="list-style-type: none"> <li>▪ Rating scale</li> </ul>
Interpersonal relations	<ul style="list-style-type: none"> <li>▪ Treat costs and expenses “as though it were your own money”—i.e., express the same level of care and concern</li> <li>▪ Verify that you and leadership or the ownership group understand budget items</li> </ul>	<ul style="list-style-type: none"> <li>▪ Competency conversation</li> </ul>
	<ul style="list-style-type: none"> <li>▪ Report concerns about the budget with the Property Manager/Owner if necessary</li> <li>▪ Encourage gradual spending throughout the fiscal year instead of saving up and needing to spend the budget all at once</li> </ul>	<ul style="list-style-type: none"> <li>▪ Composition</li> </ul>
Document management	<ul style="list-style-type: none"> <li>▪ Provide information and documents to Property Manager/Owner or Accounting</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>

## Duty 4: Manage expectations of management/owner, tenants and building users

### Task 4.1 Work collaboratively to manage expectations of users

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
Planning and prioritization	<ul style="list-style-type: none"> <li>▪ Identify lease requirements, stipulations, and exceptions to rules</li> <li>▪ Identify equipment, machinery, and system requirements</li> <li>▪ Determine what's possible within the budget</li> <li>▪ Identify tenants' business hours and coordinate work or activities to minimize impact</li> <li>▪ If managing multiple tasks resulting in delays, notify tenants of impacts</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Education and training	<ul style="list-style-type: none"> <li>▪ Stay current on industry regulations that may necessitate maintenance and impact tenants</li> </ul>	<ul style="list-style-type: none"> <li>▪ Competency conversation</li> </ul>
	<ul style="list-style-type: none"> <li>▪ Educate various parties (Property Manager/Owner, tenants):               <ul style="list-style-type: none"> <li>&gt; What's expected of equipment, machinery, and systems</li> <li>&gt; How equipment, machinery, and systems function</li> <li>&gt; Lease requirements, stipulations, and exceptions</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Communications	<ul style="list-style-type: none"> <li>▪ Create and deliver maintenance notices</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
	<ul style="list-style-type: none"> <li>▪ Proactively communicate with tenants (in person, in writing, or electronically) to ensure you are aware of their expectations</li> <li>▪ Communicate with Property Manager/Owner:               <ul style="list-style-type: none"> <li>&gt; Make them aware of your qualifications, abilities, and limitations</li> <li>&gt; Report or escalate issues if needed</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▪ Rating scale</li> </ul>

#### Duty 4: Manage expectations of management/owner, tenants and building users

##### Task 4.2 Manage complaints, needs and requests for maintenance and modifications

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
Collaboration and teamwork	<ul style="list-style-type: none"> <li>▪ Participate in conversations with Property Manager/Owner about tenant improvements:                             <ul style="list-style-type: none"> <li>&gt; Ensure their requests and/or concerns are viewed as important</li> <li>&gt; Balance discussion of complaints/requests with Property Manager/Owner priorities</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▪ Competency conversation</li> </ul>
	<ul style="list-style-type: none"> <li>▪ Participate in conversations with tenants about why equipment, machinery, or systems may be down:                             <ul style="list-style-type: none"> <li>&gt; Explain that equipment and/or machinery they install is their responsibility (unless the lease says otherwise)</li> <li>&gt; Explain when they must bear extra costs, when work will take extra time, etc.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▪ Rating scale</li> </ul>
Interpersonal relations	<ul style="list-style-type: none"> <li>▪ Be polite and attempt to accommodate requests</li> <li>▪ Invite input and work toward consensus</li> <li>▪ Use a solutions focus</li> </ul>	<ul style="list-style-type: none"> <li>▪ Rating scale</li> </ul>
Document management	<ul style="list-style-type: none"> <li>▪ Use information technology applications to record complaints and requests</li> <li>▪ Report to Property Manager/Owner</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>

#### Duty 4: Manage expectations of management/owner, tenants and building users

##### Task 4.3 Manage resource and budget expectations of senior executives to operate safely and efficiently

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
Collaboration and teamwork	<ul style="list-style-type: none"> <li>▪ Watch carefully for opportunities to provide insight to the Property Manager/Owner</li> </ul>	<ul style="list-style-type: none"> <li>▪ Competency conversation</li> </ul>
	<ul style="list-style-type: none"> <li>▪ Maintain positive relationships with all people who are involved with the asset</li> <li>▪ Review tenant leases to maintain knowledge of contents and requirements</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Planning and prioritization	<ul style="list-style-type: none"> <li>▪ Identify the requirements and obligations of owner and tenant for tenant improvements</li> <li>▪ Identify implications of improvements on overall asset maintenance</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Interpersonal relations	<ul style="list-style-type: none"> <li>▪ Establish rapport with the Property Manager/Owner</li> <li>▪ Explain your limitations, qualifications, abilities</li> <li>▪ Share information</li> </ul>	<ul style="list-style-type: none"> <li>▪ Competency conversation</li> </ul>

## Duty 5: Act as ambassador for the organization

### Task 5.1 Conduct client relations collaboratively

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
Collaboration and teamwork	<ul style="list-style-type: none"> <li>▪ Meet with new tenants to make introductions</li> <li>▪ Visit tenants regularly (face to face) to see if they need anything</li> </ul>	<ul style="list-style-type: none"> <li>▪ Rating scale</li> </ul>
Interpersonal relations	<ul style="list-style-type: none"> <li>▪ Build good relationships</li> <li>▪ Use a good customer service approach to deliver information</li> <li>▪ Reflect company culture and values, even during off-hours</li> </ul>	<ul style="list-style-type: none"> <li>▪ Rating scale</li> </ul>

### Duty 5: Act as ambassador for the organization

### Task 5.2 Communicate effectively with other team members

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
Collaboration and teamwork	<ul style="list-style-type: none"> <li>▪ Conduct rounds or face-to-face visits throughout the building</li> <li>▪ Share information</li> <li>▪ Obtain news or feedback from staff and contractors</li> <li>▪ Seek client feedback routinely:               <ul style="list-style-type: none"> <li>&gt; In person</li> <li>&gt; Phone</li> <li>&gt; Survey</li> <li>&gt; Other</li> </ul> </li> <li>▪ Follow up on service requests after completion</li> </ul>	<ul style="list-style-type: none"> <li>▪ Rating scale</li> </ul>
Interpersonal relations	<ul style="list-style-type: none"> <li>▪ Build good relationships</li> </ul>	<ul style="list-style-type: none"> <li>▪ Rating scale</li> </ul>
Communications	<ul style="list-style-type: none"> <li>▪ Use computer-based technology to solicit feedback informally or formally</li> <li>▪ Provide information to employees and staff</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>

## Duty 5: Act as ambassador for the organization

### Task 5.3 Engage professionally with all stakeholders

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
Interpersonal relations	<ul style="list-style-type: none"> <li>▪ Model company culture and values:               <ul style="list-style-type: none"> <li>&gt; Ensure social media is aligned with the company culture</li> </ul> </li> <li>▪ Recognize that you are the face of the organization</li> <li>▪ Represent the organization positively when engaging with anyone when:               <ul style="list-style-type: none"> <li>&gt; Off the job – Behave appropriately after work hours in public places</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▪ Competency conversation</li> </ul>
	<ul style="list-style-type: none"> <li>▪ Represent the organization positively when engaging with anyone when:               <ul style="list-style-type: none"> <li>&gt; On the job – Ensure contractors behave professionally and reflect the company culture</li> </ul> </li> <li>▪ Show respect when working in tenant space:               <ul style="list-style-type: none"> <li>&gt; Leave space tidy and clean after providing service</li> </ul> </li> <li>▪ Be sensitive to tenant rights:               <ul style="list-style-type: none"> <li>&gt; Respect privacy concerns</li> <li>&gt; Respect considerations and/or needs</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▪ Rating scale</li> </ul>
Communications	<ul style="list-style-type: none"> <li>▪ Use verbal communication tactics:               <ul style="list-style-type: none"> <li>&gt; Use a professional tone when speaking</li> <li>&gt; Be cheerful</li> </ul> </li> <li>▪ Use non-verbal communication tactics:               <ul style="list-style-type: none"> <li>&gt; Dress neatly and appropriately</li> <li>&gt; Stand up straight</li> <li>&gt; Make eye contact</li> <li>&gt; Have clean hands</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▪ Rating scale</li> </ul>

## Duty 6: Maintain currency with education and standards

### Task 6.1 Maintain knowledge of and compliance with legislation and regulations

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
Planning and prioritization	<ul style="list-style-type: none"> <li>▪ Identify when regulations change</li> <li>▪ Comply with ongoing and new regulations as required by government</li> </ul>	<ul style="list-style-type: none"> <li>▪ Competency conversation</li> </ul>
	<ul style="list-style-type: none"> <li>▪ Coordinate routine inspections and maintenance with other activities throughout the year</li> <li>▪ Identify expenses that need to be passed on to tenants</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Communications	<ul style="list-style-type: none"> <li>▪ Communicate expenses to tenants and Property Manager/Owner</li> <li>▪ Communicate regulations regarding efficiency, sustainability, and safety to tenants and Property Manager/Owner</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Education and training	<ul style="list-style-type: none"> <li>▪ Take advantage of learning opportunities to continually improve technical knowledge and skill about building maintenance and property management</li> <li>▪ Attend BOMA and industry events</li> </ul>	<ul style="list-style-type: none"> <li>▪ Composition</li> </ul>
Document management	<ul style="list-style-type: none"> <li>▪ Record changes</li> <li>▪ Submit reports to Property Manager/Owner as needed</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>

## Duty 6: Maintain currency with education and standards

### Task 6.2 Maintain knowledge of technology

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
Planning and prioritization	<ul style="list-style-type: none"> <li>▪ Recognize the trend toward increased computer-based building operation</li> <li>▪ Maintain comfort level with computer work</li> </ul>	<ul style="list-style-type: none"> <li>▪ Competency conversation</li> </ul>
	<ul style="list-style-type: none"> <li>▪ Stay up to date on:               <ul style="list-style-type: none"> <li>&gt; The evolution of “smart” system technology</li> <li>&gt; How control systems function in a building</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▪ Composition</li> </ul>
Education and training	<ul style="list-style-type: none"> <li>▪ Obtain information from safety authorities</li> <li>▪ Take training as needed and when directed to stay current on regulations regarding efficiency and sustainability</li> <li>▪ Attend BOMA and industry events</li> <li>▪ Use computer-based technology to relay new learnings to contractors</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>

## Duty 6: Maintain currency with education and standards

### Task 6.3 Prioritize learning needs

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
Planning and prioritization	<ul style="list-style-type: none"><li>▪ Have a career focus, with one-, three- and five-year plans</li><li>▪ Take advantage of the company training budget – be aware of what it is</li><li>▪ Communicate with supervisors when you want to take training; be able to explain why it's relevant</li></ul>	<ul style="list-style-type: none"><li>▪ Competency conversation</li></ul>
Education and training	<ul style="list-style-type: none"><li>▪ Maintain awareness of trends in building operations</li><li>▪ Monitor BOMA, or industry governing body, for direction on changes, new regulations, and associated training</li><li>▪ Be aware of gaps in knowledge, or weaknesses, and propose training accordingly</li><li>▪ Utilize resources such as co-workers, industry peers, and contractors to grow skill set</li></ul>	<ul style="list-style-type: none"><li>▪ Competency conversation</li></ul>

## INSTRUMENTS FOR PROPERTY MANAGER COMPETENCIES

The PM competency profile lists a total of 22 tasks associated with five duties. Each task is profiled in terms of the competencies and their associated behaviours a PM is expected to perform on the job to demonstrate their competence in the occupation.

Accordingly, assessment of each task is displayed in terms of suggested knowledge and performance assessment instruments.

It is important to note that the instruments are listed by name only. Each one will have to be developed so that they accurately reflect the criteria a PM is expected to perform. See the development notes that follow.

### Duty 1: Manage an asset's financial condition in keeping with industry standards and owners' goals

#### Task 1.1 Prepare and maintain operating budget

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
Budgeting	<ul style="list-style-type: none"> <li>▪ Identify budget items that make up costs:               <ul style="list-style-type: none"> <li>&gt; Contracts</li> <li>&gt; Leases (to identify tenants' portion of operating costs)</li> <li>&gt; Other</li> </ul> </li> <li>▪ Identify budget items that make up revenue</li> <li>▪ Prepare annual operating budget</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Organization and time management	<ul style="list-style-type: none"> <li>▪ Conduct risk assessments and appraisals</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
	<ul style="list-style-type: none"> <li>▪ Protect (maintain or improve) net operating income year over year</li> <li>▪ Ensure budget allocations are spread throughout the year</li> </ul>	<ul style="list-style-type: none"> <li>▪ Composition</li> </ul>
Financial management	<ul style="list-style-type: none"> <li>▪ Manage immediate operating costs</li> </ul>	<ul style="list-style-type: none"> <li>▪ Rating scale</li> </ul>
	<ul style="list-style-type: none"> <li>▪ Monitor revenue and expenditures</li> </ul>	<ul style="list-style-type: none"> <li>▪ Rating scale</li> </ul>
	<ul style="list-style-type: none"> <li>▪ Maintain budget documents in keeping with requirements of Accounting or other departments</li> </ul>	<ul style="list-style-type: none"> <li>▪ Rating scale</li> </ul>
Interpersonal relations	<ul style="list-style-type: none"> <li>▪ Approach tenants to contribute to operating costs based on leases</li> <li>▪ Discuss budget information with building management personnel and owner</li> </ul>	<ul style="list-style-type: none"> <li>▪ Rating scale</li> </ul>

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
Document management	<ul style="list-style-type: none"> <li>▪ Follow privacy and confidentiality requirements for document storage</li> <li>▪ Report progress to owner</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>

**Duty 1: Manage an asset’s financial condition in keeping with industry standards and owners’ goals**

**Task 1.2 Prepare and maintain capital budget**

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
Budgeting	<ul style="list-style-type: none"> <li>▪ Identify budget items that make up costs</li> <li>▪ Identify budget items that make up revenue:               <ul style="list-style-type: none"> <li>&gt; Rent, parking, etc.</li> <li>&gt; Recoveries (e.g.: amortizations)</li> </ul> </li> <li>▪ Prepare annual capital budget</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Planning and prioritization	<ul style="list-style-type: none"> <li>▪ Review plans and goals:               <ul style="list-style-type: none"> <li>&gt; Construction to replace or upgrade “big-ticket” items to create efficiency and value</li> <li>&gt; Add-ons</li> </ul> </li> <li>▪ Review five- to 10-year costs</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Financial management	<ul style="list-style-type: none"> <li>▪ Monitor revenue and expenditures</li> </ul>	<ul style="list-style-type: none"> <li>▪ Rating scale</li> </ul>
	<ul style="list-style-type: none"> <li>▪ Maintain budget documents in keeping with requirements of Accounting or other departments</li> </ul>	<ul style="list-style-type: none"> <li>▪ Rating scale</li> </ul>
Interpersonal relations	<ul style="list-style-type: none"> <li>▪ Discuss goals with owner</li> <li>▪ Review rent schedules with Accounting</li> <li>▪ Discuss budget information with building management personnel and owner</li> </ul>	<ul style="list-style-type: none"> <li>▪ Rating scale</li> </ul>
Document management	<ul style="list-style-type: none"> <li>▪ Follow privacy and confidentiality requirements for document storage</li> <li>▪ Report progress to owner</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>

**Duty 1: Manage an asset’s financial condition in keeping with industry standards and owners’ goals**

**Task 1.3 Maintain financial agreements including leases and licences**

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
Decision making	<ul style="list-style-type: none"> <li>▪ Decide how to manage agreements</li> <li>▪ Determine when to outsource to leasing agents (typically vacant spaces vs. renewals)</li> <li>▪ Ensure leasing agents are representing properties properly</li> </ul>	<ul style="list-style-type: none"> <li>▪ Competency conversation</li> </ul>

Organization and time management	<ul style="list-style-type: none"> <li>▪ Negotiate lease renewals</li> <li>▪ Negotiate minor lease agreements (parking, storage, signage) and lease payment increases directly</li> </ul>	<ul style="list-style-type: none"> <li>▪ Rating scale</li> </ul>
Financial management	<ul style="list-style-type: none"> <li>▪ Monitor financial agreements, leases, and licences: <ul style="list-style-type: none"> <li>&gt; Give feedback on agreements, make suggestions, answer questions, etc.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▪ Rating scale</li> </ul>
	<ul style="list-style-type: none"> <li>▪ Maintain budget documents in keeping with requirements of Accounting or other departments</li> </ul>	<ul style="list-style-type: none"> <li>▪ Rating scale</li> </ul>
Communication	<ul style="list-style-type: none"> <li>▪ Communicate with tenants: <ul style="list-style-type: none"> <li>&gt; Negotiate, give feedback on agreements, make suggestions, answer questions, etc.</li> </ul> </li> <li>▪ Communicate with leasing agents</li> <li>▪ Share documents with other departments and parties as needed</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Education and training	<ul style="list-style-type: none"> <li>▪ Maintain knowledge of types of leases and how they operate</li> </ul>	<ul style="list-style-type: none"> <li>▪ Competency conversation</li> </ul>
Document management	<ul style="list-style-type: none"> <li>▪ Follow privacy and confidentiality requirements for document storage</li> <li>▪ Report progress to owner</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>

**Duty 1: Manage an asset’s financial condition in keeping with industry standards and owners’ goals**

**Task 1.4 Interpret financial statements and report on budgetary variances**

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
Financial management	<ul style="list-style-type: none"> <li>▪ Review financial statements per budget</li> <li>▪ Use correct coding</li> <li>▪ Identify variances</li> <li>▪ Make adjustments as necessary</li> <li>▪ Review property tax assessments</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
	<ul style="list-style-type: none"> <li>▪ Review insurance policies – do repair/replacement cost studies</li> </ul>	<ul style="list-style-type: none"> <li>▪ Rating scale</li> </ul>
Organization and time management	<ul style="list-style-type: none"> <li>▪ Manage accounts receivable</li> <li>▪ Manage accounts payable</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Interpersonal relations	<ul style="list-style-type: none"> <li>▪ Liaise with accountant or Accounting Department if one exists</li> <li>▪ Respond to questions from landlords and owner</li> <li>▪ Report property tax assessments to landlords and discuss appeals</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
Document management	<ul style="list-style-type: none"> <li>▪ Follow privacy and confidentiality requirements for document storage</li> <li>▪ Use computer-based technology to report adjustments to financial statements and variances to owner/landlord</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>

**Duty 1: Manage an asset's financial condition in keeping with industry standards and owners' goals**

**Task 1.5 Conduct cashflow forecasting and analysis**

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
Decision making	<ul style="list-style-type: none"> <li>▪ Determine frequency of cashflow accounting: <ul style="list-style-type: none"> <li>&gt; Decide if another frequency than usual monthly period is necessary (e.g.: bi-monthly or daily due to unforeseen circumstances)</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Financial management	<ul style="list-style-type: none"> <li>▪ Forecast the cashflow requirements for the year</li> <li>▪ Analyze the existing state of cashflow to identify cautions and possibility of future changes</li> <li>▪ Reassess when circumstances change</li> </ul>	<ul style="list-style-type: none"> <li>▪ Composition</li> </ul>

**Duty 1: Manage an asset's financial condition in keeping with industry standards and owners' goals**

**Task 1.6 Manage transactions including receivables and payables**

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
Financial management	<ul style="list-style-type: none"> <li>▪ Distribute cash to landlords on a monthly basis (operating income for their investment)</li> <li>▪ Make operating cost adjustments</li> <li>▪ Bill tenants (or report actuals vs. forecasted)</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Interpersonal relations	<ul style="list-style-type: none"> <li>▪ Meet regularly with accountants to look at cash distribution with landlords, especially with large invoices such as insurance and property tax</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Organization and time management	<ul style="list-style-type: none"> <li>▪ Ensure there are sufficient funds to cover large expenses</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>

**Duty 1: Manage an asset’s financial condition in keeping with industry standards and owners’ goals**

**Task 1.7 Manage an asset’s financial condition in keeping with the owner’s goals**

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
Planning and prioritization	<ul style="list-style-type: none"> <li>▪ Be aware of the owner’s fiscal goals</li> <li>▪ Be aware of the condition/age of the building</li> </ul>	<ul style="list-style-type: none"> <li>▪ Competency conversation</li> </ul>
Decision making	<ul style="list-style-type: none"> <li>▪ Determine current operating income as projected at the time of asset purchase (ROI = net operating income divided by asset purchase price)</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Financial management	<ul style="list-style-type: none"> <li>▪ Conduct risk assessments per insurance premiums</li> </ul>	<ul style="list-style-type: none"> <li>▪ Rating scale</li> </ul>
	<ul style="list-style-type: none"> <li>▪ Manage lease renewals</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
	<ul style="list-style-type: none"> <li>▪ Maintain operating income</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Interpersonal relations	<ul style="list-style-type: none"> <li>▪ Build an environment that permits meaningful negotiation with tenants</li> <li>▪ Present and discuss lease renewals with landlord and tenants</li> </ul>	<ul style="list-style-type: none"> <li>▪ Rating scale</li> </ul>

**Duty 1: Manage an asset’s financial condition in keeping with industry standards and owners’ goals**

**Task 1.8 Manage construction of a capital project**

**Note:** Not all PMs conduct capital construction projects. For those that are responsible for this, the following tasks are completed.

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
Decision making	<ul style="list-style-type: none"> <li>▪ Determine who will manage construction:                             <ul style="list-style-type: none"> <li>&gt; Self-manage (plan, manage budget, implement)</li> <li>&gt; Contract out (e.g.: Project Manager)</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Planning and prioritization	<ul style="list-style-type: none"> <li>▪ Scope the project:                             <ul style="list-style-type: none"> <li>&gt; If contracting out, secure Project Manager/consultants to forecast work requirements</li> <li>&gt; Whether self-managing or contracting out:                                     <ul style="list-style-type: none"> <li>○ Review reports</li> <li>○ Solicit tenders</li> <li>○ Determine costs</li> <li>○ Select successful tenders</li> </ul> </li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
Contract management	<ul style="list-style-type: none"> <li>▪ Create contracts</li> <li>▪ Obtain sign-offs on contracts: <ul style="list-style-type: none"> <li>&gt; Discuss contractor requirements, schedule, invoicing, payment, etc.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
	<ul style="list-style-type: none"> <li>▪ Administer contracts and agreements</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
	<ul style="list-style-type: none"> <li>▪ Review ongoing contracts regularly</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Financial management	<ul style="list-style-type: none"> <li>▪ Create a capital construction budget</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
	<ul style="list-style-type: none"> <li>▪ Pay invoices promptly</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Project management	<ul style="list-style-type: none"> <li>▪ If self-managing, perform project management</li> <li>▪ Manage schedule and strategies to avoid delays</li> <li>▪ Coordinate work to minimize inconvenience to tenants</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
	<ul style="list-style-type: none"> <li>▪ If contracting out, oversee Project Manager, contractors, and subcontractors</li> <li>▪ Manage schedule and strategies to avoid delays</li> <li>▪ Coordinate work to minimize inconvenience to tenants</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Interpersonal relations	<ul style="list-style-type: none"> <li>▪ Act as liaison between tenant and owner if appropriate</li> <li>▪ Speak collaboratively with construction personnel (contractor superintendents, contractors, and subcontractors) and building maintenance personnel (e.g., Building Operator)</li> </ul>	<ul style="list-style-type: none"> <li>▪ Rating scale</li> </ul>
Communication	<ul style="list-style-type: none"> <li>▪ Communicate project information to tenants: <ul style="list-style-type: none"> <li>&gt; Translate information from Project Manager, general contractor, and tradespeople into common language to ensure tenant understanding</li> <li>&gt; Describe schedule and strategies to manage delays</li> <li>&gt; Describe costs</li> <li>&gt; Explain cost overruns if appropriate</li> <li>&gt; Notify if interruptions are expected</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Document management	<ul style="list-style-type: none"> <li>▪ Maintain accurate project records</li> <li>▪ Follow privacy and confidentiality requirements for document storage</li> <li>▪ Report progress to owner</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>

## Duty 2: Plan and oversee the operation of an asset to meet industry, government, and other standards and regulations while complying with provincial building codes, municipal bylaws, and lease obligations

### Task 2.1 Monitor the overall condition of all components of the physical asset

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
Planning and prioritization	<ul style="list-style-type: none"> <li>▪ Determine when repairs or upgrades are needed</li> <li>▪ Review budget for immediate and 10-year preventative maintenance requirements</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Collaboration and teamwork	<ul style="list-style-type: none"> <li>▪ Work with building maintenance personnel (e.g., Building Operator) to determine level of involvement in implementation</li> <li>▪ Verify that you and building maintenance personnel are aligned on responsibilities</li> </ul>	<ul style="list-style-type: none"> <li>▪ Competency conversation</li> </ul>
Document management	<ul style="list-style-type: none"> <li>▪ Prepare documentation</li> <li>▪ Follow privacy and confidentiality requirements for document storage</li> <li>▪ Report to landlord/owner</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>

## Duty 2: Plan and oversee the operation of an asset to meet industry, government, and other standards and regulations while complying with provincial building codes, municipal bylaws, and lease obligations

### Task 2.2 Oversee physical plant operation

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
Decision making	<ul style="list-style-type: none"> <li>▪ Determine appropriate party to complete physical plant operation:               <ul style="list-style-type: none"> <li>&gt; Building maintenance personnel (e.g., Building Operator)</li> <li>&gt; Third-party company</li> </ul> </li> <li>▪ Ensure they have the skill and tools to do the work</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Interpersonal relations	<ul style="list-style-type: none"> <li>▪ Discuss physical plant operation requirements with maintenance personnel or a third party</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Organization and time management	<ul style="list-style-type: none"> <li>▪ Oversee physical plant operation</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
	<ul style="list-style-type: none"> <li>▪ Acknowledge responsibility to the owner</li> </ul>	<ul style="list-style-type: none"> <li>▪ Competency conversation</li> </ul>
Document management	<ul style="list-style-type: none"> <li>▪ Prepare documentation</li> <li>▪ Follow privacy and confidentiality requirements for document storage</li> <li>▪ Report to landlord/owner</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>

**Duty 2: Plan and oversee the operation of an asset to meet industry, government, and other standards and regulations while complying with provincial building codes, municipal bylaws, and lease obligations**

**Task 2.3 Manage contracts for services**

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
Organization and time management	<ul style="list-style-type: none"> <li>▪ Liaise with people responsible for building operation (self-managing, Building Operator, or third-party contractors and service providers)</li> <li>▪ If self-managing or contracting out, schedule inspections, service delivery, and contractor work</li> <li>▪ Monitor work done</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Contract management	<ul style="list-style-type: none"> <li>▪ Create contracts for services (e.g., repair, replacement, installation)</li> <li>▪ Obtain sign-offs on contracts:               <ul style="list-style-type: none"> <li>&gt; Discuss contractor requirements, schedule, invoicing, payment, etc.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
	<ul style="list-style-type: none"> <li>▪ Administer contracts and agreements</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
	<ul style="list-style-type: none"> <li>▪ Review ongoing contracts regularly</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Financial management	<ul style="list-style-type: none"> <li>▪ Administer contracts and agreements with sensitivity and fairness</li> </ul>	<ul style="list-style-type: none"> <li>▪ Rating scale</li> </ul>
	<ul style="list-style-type: none"> <li>▪ Ensure funds are available to pay for work</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
	<ul style="list-style-type: none"> <li>▪ Pay invoices promptly</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Interpersonal relations	<ul style="list-style-type: none"> <li>▪ Maintain regular contact and good relationships with tradespeople, contractors, and service providers</li> <li>▪ Negotiate requirements, schedule, invoicing, payment, etc.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Rating scale</li> </ul>
Document management	<ul style="list-style-type: none"> <li>▪ Follow privacy and confidentiality requirements to prepare and store documents</li> <li>▪ Report to landlord/owner</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>

**Duty 2: Plan and oversee the operation of an asset to meet industry, government, and other standards and regulations while complying with provincial building codes, municipal bylaws, and lease obligations**

**Task 2.4 Handle incidents and insurance claims**

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
Decision making	<ul style="list-style-type: none"> <li>▪ Decide who will conduct safety risk assessments:               <ul style="list-style-type: none"> <li>&gt; Perform safety risk assessments yourself</li> <li>&gt; Outsource to insurance company</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▪ Competency conversation</li> </ul>
Organization and time management	<ul style="list-style-type: none"> <li>▪ Oversee safety risk assessments</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
	<ul style="list-style-type: none"> <li>▪ Administer insurance claims according to carrier protocols</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
	<ul style="list-style-type: none"> <li>▪ Schedule fire inspections</li> <li>▪ Conduct inspections:               <ul style="list-style-type: none"> <li>&gt; Trip-and-fall hazards</li> <li>&gt; Blockages</li> <li>&gt; Other</li> </ul> </li> <li>▪ List specific details about equipment or the physical plant</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Document management	<ul style="list-style-type: none"> <li>▪ Follow privacy and confidentiality requirements for document storage</li> <li>▪ Submit to landlord/owner</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>

**Duty 2: Plan and oversee the operation of an asset to meet industry, government, and other standards and regulations while complying with provincial building codes, municipal bylaws, and lease obligations**

**Task 2.5 Maintain the lease obligations of all parties to the agreement**

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
Planning and prioritization	<ul style="list-style-type: none"> <li>▪ Develop lease or parking agreements</li> <li>▪ Ensure they contribute to landlord's financial and recovery framework</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Organization and time management	<ul style="list-style-type: none"> <li>▪ Coordinate tenant upgrades/modifications</li> <li>▪ Manage lease obligations to ensure rules and regulations are being met</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Financial management	<ul style="list-style-type: none"> <li>▪ Manage rent payments</li> <li>▪ Manage tenant default options for recovery, possession, etc.</li> <li>▪ Invoice tenants for upgrades/modifications</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
Document management	<ul style="list-style-type: none"> <li>▪ Prepare documentation</li> <li>▪ Follow privacy and confidentiality requirements for document storage</li> <li>▪ Report to landlord/owner</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>

### **Duty 3: Manage and oversee the administration of an asset to maximize/meet the owner’s goals in keeping with industry standards**

#### **Task 3.1 Maintain accurate property/building documentation**

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
Decision making	<ul style="list-style-type: none"> <li>▪ Decide who will maintain documentation: <ul style="list-style-type: none"> <li>&gt; Self</li> <li>&gt; Lease administration department</li> </ul> </li> <li>▪ Ensure that documentation is completed; provide final judgment as to completeness.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Competency conversation</li> </ul>
Planning and prioritization	<ul style="list-style-type: none"> <li>▪ Develop appropriate documentation: <ul style="list-style-type: none"> <li>&gt; Standard Operating Procedures (SOPs)</li> <li>&gt; Safety plans</li> <li>&gt; Emergency plans</li> <li>&gt; Environmental and specialty consultant reports</li> <li>&gt; Warranties</li> <li>&gt; Service contract documentation and correspondence</li> <li>&gt; Lease documentation and correspondence</li> <li>&gt; Other</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Document management	<ul style="list-style-type: none"> <li>▪ Follow privacy and confidentiality requirements for document storage</li> <li>▪ Submit to landlord/owner</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>

### **Duty 3: Manage and oversee the administration of an asset to maximize/meet the owner’s goals in keeping with industry standards**

#### **Task 3.2 Manage tenant responsibilities**

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
Decision making	<ul style="list-style-type: none"> <li>▪ Pull credit reports to decide if potential tenants are financially viable</li> <li>▪ Determine what is covered by tenant warranties</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
Organization and time management	<ul style="list-style-type: none"> <li>▪ Maintain currency of tenant improvements:               <ul style="list-style-type: none"> <li>&gt; Review building/work plans and give approval</li> <li>&gt; Coordinate with construction contractors or Project Manager if necessary</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▪ Competency conversation</li> </ul>
	<ul style="list-style-type: none"> <li>▪ Confirm tenants have provided certificate of insurance</li> <li>▪ Confirm tenants' insurance meets lease obligations</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
	<ul style="list-style-type: none"> <li>▪ Protect tenant warranties:               <ul style="list-style-type: none"> <li>&gt; Conduct preventative maintenance</li> <li>&gt; Conduct inspections</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Financial management	<ul style="list-style-type: none"> <li>▪ Set up direct deposit or electronic funds transfer for tenants</li> <li>▪ Pay out tenant improvement allowances</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Interpersonal relations	<ul style="list-style-type: none"> <li>▪ Discuss tenant responsibilities</li> <li>▪ Review:               <ul style="list-style-type: none"> <li>&gt; Rent changes</li> <li>&gt; Step-ups</li> <li>&gt; Contact information</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Document management	<ul style="list-style-type: none"> <li>▪ Prepare documentation</li> <li>▪ Follow privacy and confidentiality requirements for document storage</li> <li>▪ Report to landlord/owner</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>

**Duty 3: Manage and oversee the administration of an asset to maximize/meet the owner's goals in keeping with industry standards**

**Task 3.3 Manage personnel including staff and contractors**

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
Decision making	<ul style="list-style-type: none"> <li>▪ Decide who manages staff and contractors:               <ul style="list-style-type: none"> <li>&gt; Human Resources department, if one exists</li> <li>&gt; Building Operator or BO department</li> <li>&gt; Self – hire and supervise contractors and maintenance personnel</li> </ul> </li> <li>▪ Assume responsibility for performance of staff and contractors</li> </ul>	<ul style="list-style-type: none"> <li>▪ Competency conversation</li> </ul>

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
Organization and time management	<ul style="list-style-type: none"> <li>▪ Review occupational health and safety (OHS) regulations</li> <li>▪ Manage personnel to ensure compliance with: <ul style="list-style-type: none"> <li>&gt; OHS regulations</li> <li>&gt; WCB clearances</li> <li>&gt; Insurance</li> <li>&gt; Law and regulations</li> </ul> </li> <li>▪ Ensure contractors supply insurance documents, WCB clearance, etc.</li> <li>▪ Complete incident reports/WCB claims for contractors and technicians</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Education and training	<ul style="list-style-type: none"> <li>▪ Ask questions to ensure everyone working in the building is up to date with legal, regulatory and best practice training</li> <li>▪ Arrange for training: <ul style="list-style-type: none"> <li>&gt; Fast, specific needs training</li> <li>&gt; Annual required training</li> </ul> </li> <li>▪ Ensure best practice training: <ul style="list-style-type: none"> <li>&gt; WHMIS</li> <li>&gt; Hazardous materials</li> <li>&gt; Other</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Document management	<ul style="list-style-type: none"> <li>▪ Prepare documentation</li> <li>▪ Follow privacy and confidentiality requirements for document storage</li> <li>▪ Report to landlord/owner</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>

## Duty 4: Oversee internal and external market relations

### Task 4.1 Conduct tenant relations and retention activities

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
Organization and time management	<ul style="list-style-type: none"> <li>▪ Identify everyone and their functions: <ul style="list-style-type: none"> <li>&gt; Tenants</li> <li>&gt; Occupants</li> <li>&gt; Employees</li> <li>&gt; Maintenance personnel</li> <li>&gt; Janitorial service providers</li> <li>&gt; Others</li> </ul> </li> <li>▪ Identify tenants who are having financial problems</li> </ul>	<ul style="list-style-type: none"> <li>▪ Competency conversation</li> </ul>

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
	<ul style="list-style-type: none"> <li>▪ Develop a well-articulated tenant retention plan</li> </ul>	<ul style="list-style-type: none"> <li>▪ Rating scale</li> </ul>
Communication	<ul style="list-style-type: none"> <li>▪ Administer promotion, signage</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
	<ul style="list-style-type: none"> <li>▪ Conduct surveys</li> </ul>	<ul style="list-style-type: none"> <li>▪ Rating scale</li> </ul>
Interpersonal relations	<ul style="list-style-type: none"> <li>▪ Act as liaison between tenants and landlord; rephrase/soften messages if necessary</li> </ul>	<ul style="list-style-type: none"> <li>▪ Competency conversation</li> </ul>
	<ul style="list-style-type: none"> <li>▪ Conduct regular (e.g., monthly) meetings in person or via electronic meeting applications</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
	<ul style="list-style-type: none"> <li>▪ Meet tenants – especially large tenants with complicated operations – proactively to discuss their intentions</li> <li>▪ Use positive engagement tactics to encourage tenants who may be reluctant to identify issues</li> </ul>	<ul style="list-style-type: none"> <li>▪ Rating scale</li> </ul>

**Duty 4: Oversee internal and external market relations**

**Task 4.2 Maintain currency with market trends**

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
Organization and time management	<ul style="list-style-type: none"> <li>▪ Participate in BOMA BC:               <ul style="list-style-type: none"> <li>&gt; Maintain membership</li> <li>&gt; Attend events/presentations</li> <li>&gt; Stay abreast of changes</li> <li>&gt; Get information about industry changes</li> </ul> </li> <li>▪ Meet with industry peers</li> <li>▪ Identify initiatives taken by municipalities</li> </ul>	<ul style="list-style-type: none"> <li>▪ Competency conversation</li> </ul>
Planning and prioritization	<ul style="list-style-type: none"> <li>▪ Be aware of trends (e.g., code changes)</li> </ul>	<ul style="list-style-type: none"> <li>▪ Competency conversation</li> </ul>
	<ul style="list-style-type: none"> <li>▪ Monitor the market</li> <li>▪ Conduct market comparisons to identify:               <ul style="list-style-type: none"> <li>&gt; Lease rates, rates of services/contractors</li> <li>&gt; Current rates for rents/services, etc.</li> <li>&gt; Market conditions</li> </ul> </li> <li>▪ Identify how the market might affect tenant retention</li> <li>▪ Compare lease rates, market trends, rates of services/contractors</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Education and training	<ul style="list-style-type: none"> <li>▪ Share what you learn with tenants and landlord/owner</li> </ul>	<ul style="list-style-type: none"> <li>▪ Composition</li> <li>▪ Competency conversation</li> </ul>

#### Duty 4: Oversee internal and external market relations

##### Task 4.3 Conduct social, charitable, community programming, and business development events

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
Organization and time management	<ul style="list-style-type: none"> <li>▪ Identify opportunities to give back to the community</li> </ul>	<ul style="list-style-type: none"> <li>▪ Competency conversation</li> </ul>
	<ul style="list-style-type: none"> <li>▪ Conduct business development activities</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
	<ul style="list-style-type: none"> <li>▪ Make donations to other organizations</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Communication	<ul style="list-style-type: none"> <li>▪ Promote your property or properties</li> </ul>	<ul style="list-style-type: none"> <li>▪ Rating scale</li> </ul>
Interpersonal relations	<ul style="list-style-type: none"> <li>▪ Maintain contact with the Chamber of Commerce or other community organizations</li> <li>▪ Work with landlord/owner:                             <ul style="list-style-type: none"> <li>&gt; Identify corporate social responsibility</li> <li>&gt; Represent the company brand in public</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▪ Competency conversation</li> </ul>
	<ul style="list-style-type: none"> <li>▪ Participate in other company-sponsored events</li> <li>▪ Talk to various parties about:                             <ul style="list-style-type: none"> <li>&gt; What they are interested in</li> <li>&gt; Their needs</li> <li>&gt; How you can connect</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>

#### Duty 5: Develop sustainable practices in the operation of the property asset in keeping with local, provincial and national standards, and owner and tenant goals

##### Task 5.1 Optimize the asset's energy efficiency

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
Organization and time management	<ul style="list-style-type: none"> <li>▪ Identify BOMA BEST resources:                             <ul style="list-style-type: none"> <li>&gt; Attend webinars and events</li> <li>&gt; Study website</li> <li>&gt; Participate in BOMA Go Green program</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▪ Competency conversation</li> </ul>
	<ul style="list-style-type: none"> <li>▪ Assess all buildings through an environmental and sustainability lens</li> <li>▪ Perform ongoing monitoring of properties</li> <li>▪ Track utility consumption, waste diversion, and air quality; determine how to manipulate and improve</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
	<ul style="list-style-type: none"> <li>▪ Interpret and implement other practices:               <ul style="list-style-type: none"> <li>&gt; Green leases</li> <li>&gt; Targets</li> <li>&gt; Other</li> </ul> </li> <li>▪ Take advantage of financial incentives to reduce costs</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> <li>▪ Composition</li> </ul>
Collaboration and teamwork	<ul style="list-style-type: none"> <li>▪ Collaborate with contractors and service providers to identify new standards or code changes</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Education and training	<ul style="list-style-type: none"> <li>▪ Educate tenants to make changes in utility consumption, waste diversion, and air quality</li> </ul>	<ul style="list-style-type: none"> <li>▪ Rating scale</li> </ul>

**Duty 5: Develop sustainable practices in the operation of the property asset in keeping with local, provincial and national standards, and owner and tenant goals**

**Task 5.2 Undertake waste management programs**

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
Organization and time management	<ul style="list-style-type: none"> <li>▪ Conduct waste audits on properties</li> <li>▪ Be on the alert for upcoming programs</li> <li>▪ Identify impact on budget and operating expenses</li> <li>▪ Study various materials to ensure their safety, such as:               <ul style="list-style-type: none"> <li>&gt; Landscaping chemicals</li> <li>&gt; Cleaning materials</li> <li>&gt; Construction and/or renovation waste</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Interpersonal relations	<ul style="list-style-type: none"> <li>▪ Encourage tenants and owners to participate in waste management programs</li> <li>▪ Maintain contact with service contractors</li> </ul>	<ul style="list-style-type: none"> <li>▪ Rating scale</li> </ul>
Education and training	<ul style="list-style-type: none"> <li>▪ Educate tenants and owners on the benefits of waste management</li> </ul>	<ul style="list-style-type: none"> <li>▪ Rating scale</li> </ul>

**Duty 5: Develop sustainable practices in the operation of the property asset in keeping with local, provincial and national standards, and owner and tenant goals**

**Task 5.3 Promote environmental responsibility with tenants and external parties**

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
Education and training	<ul style="list-style-type: none"> <li>▪ Provide education opportunities to tenants:               <ul style="list-style-type: none"> <li>&gt; Waste</li> <li>&gt; Power/energy savings</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▪ Rating scale</li> </ul>

Competency	Behaviours (criteria/performance indicators)	Standard instrument to use
	<ul style="list-style-type: none"> <li>&gt; New legislation</li> <li>▪ Provide staff training on environmental standards</li> <li>▪ Share information gathered:               <ul style="list-style-type: none"> <li>&gt; Sustainability reports</li> <li>&gt; Results of waste audits</li> <li>&gt; Business cases for environmental improvements</li> </ul> </li> </ul>	
Organization and time management	<ul style="list-style-type: none"> <li>▪ Identify changes in standards and best practices</li> <li>▪ Manage permits (e.g., Technical Safety BC)</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>
Communications	<ul style="list-style-type: none"> <li>▪ Engage in conversations with tenants early to provide owners/tenants with notice of any changes</li> </ul>	<ul style="list-style-type: none"> <li>▪ Rating scale</li> </ul>
	<ul style="list-style-type: none"> <li>▪ Produce and distribute information:               <ul style="list-style-type: none"> <li>&gt; Newsletter</li> <li>&gt; Website</li> <li>&gt; Social media</li> </ul> </li> <li>▪ Communicate savings opportunities to tenants/owners (e.g., rebates, EV charging, etc.)</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checklist</li> </ul>

## APPENDIX

### Principles of Competence

Fundamentally, assessment involves examining a BO or PM's ability to perform the tasks associated with their job function/occupation. More specifically, when assessing their ability to perform a task, you are trying to determine *if* they can do it and *how well* they can do it.

There are five principles of competence that must be considered when conducting an assessment:

Principle	Description
<b>Competencies are observed and measured in the context of performing tasks.</b>	<ul style="list-style-type: none"><li>Tasks are performed using the competencies, and more importantly the behaviours, by which they can be observed and measured.</li></ul>
<b>Tasks must be performed in the real world.</b>	<ul style="list-style-type: none"><li>Tasks are performed in the real, or accurately simulated, working environment.</li></ul>
<b>Competence is not the ability to perform tasks once.</b>	<ul style="list-style-type: none"><li>A person must be able to perform tasks several times consistently to be considered competent.</li></ul>
<b>Competence is the ability to perform tasks according to specified criteria.</b>	<ul style="list-style-type: none"><li>A person must perform a selected task or group of tasks several times, with increasingly limited supervision, until they are able to consistently perform them without direction or supervision.</li></ul>
<b>Assessment must be clearly focused.</b>	<ul style="list-style-type: none"><li>A person is assessed to determine their ability to perform one or more tasks in the correct order, to an acceptable level, within an acceptable timeframe.</li></ul>

## Assessment Considerations

When conducting an assessment of a PM or BO's performance, as indicated by Step 2 of the seven-step assessment procedure, there are a number of considerations that need to be made especially regarding the reason for the assessment and the selection and development of the instrument to use.

### Reasons for assessment

The reason or need to assess a PM or BO must be clearly identified and rationalized.

Although some employers often default to randomly conducting assessments or doing so without appropriate introduction and explanation, assessments should not be conducted randomly.

People often carry negative feelings about being assessed or become anxious when they are evaluated. For this reason, conducting an assessment without an identified reason can have detrimental impacts on corporate culture.

Random assessments can also be perceived as punitive. For example, BOs and PMs being assessed might feel:

- They have done something wrong
- The results will be used to punish them

Therefore, competency assessments should be conducted purposefully – to fulfill a need. There are very few reasons, if any, to assess a BO or PM's ability to perform every task in their competency profile. Usually only a specific task or set of tasks is assessed.

Typical reasons include but are not limited to:

- Knowledge priority
- Service delivery issue
- Regulatory requirements
- Introduction of new or revised tasks
- Performance improvement

### *Knowledge priority*

Knowledge precedes skill, and competence is the ability to demonstrate both. If a person can successfully perform a task or set of tasks under the conditions that prevail in the work environment, it means they possess the appropriate prerequisite knowledge.

For this reason, it is more valuable to assess a practitioner's performance than to assess their knowledge.

The bigger, overall question is whether assessing knowledge is necessary. In practice, knowledge assessment is done in four common situations where there is a recognized **knowledge priority**, as described in the table below.

Priority	Reason to assess
Some task behaviours are not practical in nature	<p>Some competencies and associated behaviours are deemed “theoretical” yet critical to know. Common reasons these competencies are deemed critical include concerns about:</p> <ul style="list-style-type: none"> <li>▪ Safety</li> <li>▪ Risk</li> <li>▪ Novelty</li> </ul>
Knowledge gap	<p>Occasionally, a person’s inability to demonstrate competence may be interpreted as a lack of background knowledge about the task. When this occurs, it may be necessary to identify exactly where the apparent knowledge gap exists.</p> <p>In such situations, a gap analysis would be conducted to identify appropriate follow-up and support, which could include coaching, mentoring, or providing learning opportunities.</p>
Common knowledge	<ul style="list-style-type: none"> <li>▪ Some tasks are so critical that fundamental background knowledge must be demonstrated to ensure they are performed correctly.</li> <li>▪ In other situations, all duties and tasks draw upon the same fundamental background knowledge.</li> <li>▪ In both situations, only tasks deemed critical/important are assessed.</li> </ul>
Introduction of new equipment, material, or process	<ul style="list-style-type: none"> <li>▪ When new equipment or material is introduced, or when practitioners are required to follow a new process, a practitioner must be completely knowledgeable about it before being able to apply or use it in their role.</li> <li>▪ An employer may decide to assess the practitioner’s knowledge to ensure their confidence that the new equipment, material, or process is successfully introduced.</li> <li>▪ In this situation, only tasks associated with the new equipment, material, or process are assessed.</li> </ul>

### ***Service delivery issue***

Competency assessments of PMs or BOs may be conducted as a result of analyzing service delivery issues relating to users of a property. Common service delivery issues include but are not limited to:

- Consistently negative feedback from canvasses (e.g.: satisfaction surveys)
- A series of consistent complaints from:
  - > Subordinates
  - > Tenants
  - > Vendors
  - > Contractors
- A series of preventable incidents and/or accidents

There must be several occurrences to justify conducting a competency assessment based on a service delivery issue – not just a few. Each occurrence would be investigated and resolved individually. A series, however, is analyzed to identify a pattern, and most importantly, to determine whether the cause is related to the performance of a practitioner.

In these situations, only tasks associated with the service delivery issue are assessed.

### ***Regulatory requirements***

When updates to existing regulations are imposed internally by an employer or the industry, or externally by law or regulation at any level of government, or by a government agency (e.g., WorkSafeBC), competency assessments are mandatory.

In addition, an owner or the industry may introduce a new policy or procedure that practitioners are required to implement.

Assessment is not conducted immediately after notice of the regulation. Once a regulation is introduced, the employer must explain it in detail, then deliver training to practitioners about the task(s) associated with it. Following training, practitioners practise performing the new/amended task(s). Finally, competency assessment is conducted to measure practitioners' competence.

In these situations, only tasks that are mandated are assessed.

### **Introduction of new or revised tasks**

The duties and tasks included in the PM and BO occupations are not static. They evolve due to a variety of factors including changes in process, introduction of new policy, changes in corporate priority, etc.

When this occurs, a new or revised task or set of tasks may be introduced that PMs and BOs are expected to implement, leading to the following:

- PMs and/or BOs are apprised of the change.

- The new or revised tasks are explained, especially in terms of their importance to the job.
- PMs or BOs are trained on how to include them in their occupation and perform them accurately.

After the new/revised tasks have been practised for a set period of time, a competency assessment can be conducted.

**Note:** This would necessitate that the occupation and competency profiles and, by extension, the Competency Assessment Framework, be revised accordingly to ensure that all future competency assessments would include the new/revised tasks.

### ***Performance improvement***

Competency assessments are usually conducted as part of an employer's performance improvement effort.

There are two common applications.

#### **Identification of a performance gap**

Most employers have mechanisms to identify anomalies in an employee's performance.

During routine observation of a BO or PM's performance by a qualified assessor or management, a change in performance may be observed. A gap may be identified – a lack of ability to perform a task or set of tasks to the minimum acceptable level of competence.

The BO or PM would then be assessed with a view to identifying supports needed to improve their performance.

#### **Routine, scheduled (e.g., annual) performance assessment**

Most employers have a performance development/management program in which an assessment of a practitioner's performance is conducted to identify:

- Areas that are done well
- Opportunities for advancement
- Areas requiring improvement/support

In these situations, the tasks assessed depend on whether the practitioner is a new hire or an incumbent:

- A new hire's ability to perform all the task(s) in the occupation is assessed according to a schedule (e.g., probation, development, improvement) with a focus on compliance.
- Incumbents are only assessed on those tasks that have been identified as part of their annual performance assessments, with a focus on improvement.

## Fundamental Instrument Development Guidelines

When the time comes to assess a PM or BO's performance, the appropriate framework should be consulted.

However, while the framework suggests assessment instruments, they currently exist in name only. As mentioned in Step 4 of the seven-step assessment procedure, full instruments may be available in the future, but for now, employers are encouraged to design and develop assessment instruments based on their analysis of the tasks that need to be assessed.

Following are three fundamental guidelines for developing an instrument.

### Analyze the tasks

After the decision to conduct an assessment has been made and the tasks to be assessed have been identified, the tasks must be analyzed thoroughly so they accurately reflect:

- The required behaviours and attributes to be demonstrated
- Any specific features of the task to be emphasized
- Any other criteria by which the PM or BO's performance is to be measured

### Example

Task 1.1 for a PM is "Prepare and maintain an operating budget." The competency "organization and time management" has a behaviour "Conduct risk assessments and appraisals," for which a **checklist** is the suggested assessment instrument to use.

Because a checklist does not yet exist, employers are encouraged to develop one as shown in the example in Step 4 of the seven-step assessment procedure. An example of what the finished product might look like appears on the following page.

Check every item in the following list if the PM does the following:

Step 1: Identify the hazards.

Determine which machines, substances, and/or procedures have been added that could lead to new hazards

Identify what the hazards are, using the “what if” technique.

Specific explanation of the risk

What will happen if the risk is not addressed (consequences)

Step 2: Decide who might be harmed and how.

Identify what hazards would affect staff

Identify what hazards would affect contractors

Identify what hazards would affect tenants

Step 3: Evaluate the risks and decide on precautions.

Determine the potential for injury to:

Staff

Contractors

Tenants

Identify the potential severity of injury

Identify the likelihood of injury occurring

Determine what control measures need to be implemented to reduce risks

Step 4: Record findings and report them.

Prepare a description of the risks identified and hazards they present

Report the risk assessment to owner

Determine steps to mitigate the risk

Update review schedule

Comments: Complete only to explain an observation and/or why an action was left unchecked.

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## Create one instrument for a group of behaviours

Depending on the prevailing circumstances and reason for assessment, there may be several behaviours for one competency in a task that have the same suggested instrument to use.

When this occurs, it may be possible or even preferable to prepare one instrument to assess all the behaviours at once.

### Example

Task 2.7 for a BO, “Maintain asset safety plans,” suggests using a **checklist** for all three of its competencies – critical thinking, communications, and document management – each of which has a checklist as the suggested assessment instrument to use. This may be a task where one composite checklist could be developed to assess all the behaviours associated with the three competencies. Without citing a lot of specific detail, here is what the finished product might look like.

Check every item in the following list.

#### Step 1. Prepare asset safety plans.

- Check current regulations
- Review existing insurance requirements

Review existing safety plans according to.

- Type of building
- Its age
- Other factors [which would be listed]

#### Step 2. Communicates the plans.

- Notify insurance company when certain work is being performed or systems will be down [work and systems would be listed]
- Notify tenants when work will impact them or there is a safety concern
- Communicate safety plans to employees

#### Step 3. Document the plans using information technology applications.

- Update safety plans
- Report to Property Manager

Comments: Complete only to explain an observation and/or why an action was left unchecked.

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## Include appropriate attributes

As described and shown in Step 4 of the seven-step assessment procedure, it is important to include in the instrument those attributes from the list of seven (see *Attributes – Occupational Standards Report*) that apply to the task and competency for which an instrument is being developed.

These attributes are not associated with any specific duties and tasks that the occupation comprises. Nevertheless, they are important aspects of the job function that must be kept in mind when performing any task.

Let's examine Property Manager Task 2.3: Manage contracts for services. The competency – contract management – is shown in Step 4 of the assessment procedure in a little more detail.

The competency has five behaviours listed:

- Create contracts
- Obtain sign-offs on contracts
- Discuss requirements, schedule, invoicing, payment, etc., with contractors
- Administer contracts and agreements
- Review ongoing contracts regularly

Each behaviour has a **checklist** shown as the suggested instrument to use.

As suggested previously, one instrument can be created for a group of behaviours. In the example, all five behaviours are considered together in terms of the attributes that apply to the task and competency. Here are the reasons for selecting four of the seven attributes that apply to this task and not the other three.

Attribute	Selection	Rationale for selection
Accountability	X	When managing a contract, the PM has to take personal responsibility for actions taken and decisions made.
Change management		Although procedures for managing contracts may evolve over time, this task is about current practice as opposed to responding to an imposed change.
Continuous improvement	X	The type, number, and complexity of service will likely evolve over time, so the PM must always ensure that contract elements are prepared and completed accurately and in a timely manner while continually seeking ways to improve the process.
Resiliency		This task is being performed according to current practice; it has not been created as a result of difficulties.

Attribute	Selection	Rationale for selection
Self-awareness and confidence	X	The PM must always self-reflect on their ability to manage a contract. They must also be confident that they are doing so within their personal limitations and strengths.
Continuous learning and development	X	The PM must always engage in self-reflection to identify new ways of performing the role. The focus of this task is to review the process regularly to improve their ability to perform the task.
Emerging technology and information systems		Although the PM should remain alert to new developments in technology, this is not the focus of this task; it is to file the contract and report to the owner.

### Evidence of competence

As described in the Occupational Standards Report, determining whether an individual is competent requires evidence. Evidence is the cornerstone of competence. Observed oral, written, or practical activities allow evidence to be obtained and measured through application of an assessment instrument.

However, the evidence collected must be relevant. It must be:

- Valid – The competency behaviours are measured.
- Current – Tasks are performed in the current work environment.
- Sufficient – Tasks are exhibited in work performance multiple times in a variety of contexts.
- Authentic – Direct, indirect, and third-party evidence can verify the work as the practitioner’s own.

Depending on the nature of the task and its associated competency behaviours, evidence of competence may require more than observation by a qualified assessor. Some tasks may include activities that require particular qualities such as voice delivery (e.g.: volume, inflection, emphasis) or physical action (e.g.: speed, duration, flow) for which recordings (audio, video, phono) should be included as evidence of competence. For these, notes must be included in the assessment instrument telling the assessor when, and if necessary how, to record the action(s).

As described in the Occupational Standards Report, only criterion-referenced assessment is used to assess a practitioner. The major implications of this type of assessment include the following.

**Regardless of whether the assessment is aimed at knowledge or skill, the overall, ultimate result is that the practitioner has either met or not met the criteria by:**

- Engaging in a conversation and answering questions or performing the task in a way that accurately demonstrates the required criteria, such as:
  - > The behaviours
  - > Specified attributes
  - > Specific features of the task, and
  - > Any other criteria by which the PM's or BO's performance is to be measured

**The expected results are specified. The practitioner is either “competent” or “not competent:**

- “Competent” means they have met a minimum acceptable score, which is expressed either:
  - > Quantitatively – the total number of correct answers to knowledge questions in a competency conversation (or other knowledge instrument) or checks in a checklist.
  - > Qualitatively – the total score of a rating scale or rubric.
- “Not yet competent” means that the practitioner will be given time to practise and improve their performance over a specified period of time until their score meets the minimum.

During that time, the practitioner receives support, which may include:

- > Coaching
- > Mentoring and/or
- > Learning opportunities

**As mentioned previously, the industry has not yet set a minimum acceptable score.**

If the industry establishes formal learning and certification, this will be one of the important outcomes.

In the meantime, the commonly accepted practice of setting 75 percent as a pass score for assessment ratings can be used. In doing so:

- This would be the minimum requirement for hiring and for early performance on the job.
- Then, as a practitioner increases their competence through practice on the job, their score would increase respectively.

## Additional Development Guidelines

The fundamental guidelines just described can be used to get started and develop an assessment instrument based on those found in the framework.

Following is some additional information for those who wish to dive deeper into development. Also included are guidelines for developing the other types of information-based and skill-based assessment instruments.

### Context

To provide context and a consistent reference for examining suggested assessment instruments, we offer the following sample subject.

In the seven-step assessment procedure cited previously, *Property Managers Example 1* stated that Duty 2, Task 2.3 has a competency – contract management – for which one of the behaviours is “Create contracts for services” (e.g.: repair, replacement, installation).

In that context, and to be able to provide examples of how to develop various assessment instruments, let’s assume the following:

- The need is to repair the driveway of the single commercial building the PM manages.
- According to one of the task competencies, the PM may self-manage the repair or manage a contractor. The PM decides to use a contractor.
- A contract would have to be made and the PM would manage it.
- The PM would require sufficient knowledge and skill about how to repair a driveway to manage a contractor to complete the work.

This means the PM would have to possess appropriate knowledge about:

- The driveway’s purpose, position, and shape.
- The typical use of the driveway (traffic volume, type of vehicles, etc.).
- What the driveway is composed of (component parts, materials, etc.).
- The driveway’s current state or condition.
- What constitutes a useable driveway.

In addition, the PM would have to possess the skills to be able to:

- Identify what needs to be done to return the driveway to a usable condition (repair).
- Plan the repair activities (activities, schedule, deliverables).
- Select the appropriate entity (company, individuals) to make the required repair.
- Oversee work to make the repair.
- Inspect and approve completion.

Hence, the competencies are:

- Organization and time management:
  - > Understand contractor requirements.
  - > Schedule the work.
  - > Manage invoicing and payment.
- Contract management:
  - > Create a contract.
  - > Obtain sign-off.
  - > Monitor the work done.
- Financial management:
  - > Ensure funds are available.
  - > Administer the contract.
  - > Pay invoices.

Let's use this scenario as a reference to describe guidelines for developing various types of information-based and skill-based assessment instruments.

## Guidelines for Development of Knowledge-Based Instruments

As mentioned previously, the **competency conversation** is used to assess knowledge. As the name implies, it is administered orally. It is perhaps the most commonly used instrument for assessing any type of knowledge.

Three other instruments that may be used to assess knowledge are an **exam**, **composition**, and **situation analysis**, all of which are administered in writing.

Regardless of how it is administered, each one has to be developed and documented so it can be delivered consistently. Following are guidelines you can use to develop each instrument, and examples based on the driveway repair scenario.

### Competency conversation – development guidelines

A competency conversation is a typical and appropriate oral instrument to observe and assess a PM or BO's ability to demonstrate they have the knowledge associated with a task or tasks.

On the following page are some simple guidelines to conduct an assessment using a competency conversation.

Delivery	Conditions	Follow-up
<p>Organized, structured, and purposeful one-on-one discussion (not a formal interview) conducted in an open, assertive, confident manner.</p> <p>Not as simple as having a dialogue.</p>	<p>Purpose of the conversation is explained:</p> <ul style="list-style-type: none"> <li>▪ Why it is being held (reason for it)</li> <li>▪ The subject</li> <li>▪ How knowledge will be assessed (key facts, concepts, principles, applications, etc., that must be revealed – criteria)</li> </ul> <p>The assessor conducting the conversation is qualified:</p> <ul style="list-style-type: none"> <li>▪ Highly skilled in interpersonal relations</li> <li>▪ Highly skilled in both verbal and non-verbal communication</li> </ul> <p>The conditions under which the conversation is conducted are controlled:</p> <ul style="list-style-type: none"> <li>▪ PM or BO is assessed individually</li> <li>▪ Environment is safe and independent (not the actual working environment, if possible, as it may provide clues)</li> </ul> <p>Discussion is driven by a set of qualified questions, which are peer reviewed by qualified practitioners who pay particular attention to questions that have a “must” as opposed to a “could” response.</p> <p>Questions:</p> <ul style="list-style-type: none"> <li>▪ Based on the competencies and behaviours associated with a specific job task or set of tasks</li> <li>▪ Stated positively and in no way intended to trick the respondent</li> <li>▪ Are provided as a guide for the assessor (asked in the format and language they feel is appropriate)</li> </ul> <p>Responses must specify:</p> <ul style="list-style-type: none"> <li>▪ Critical points of information about the task(s)</li> <li>▪ All safety-critical or important information</li> <li>▪ Additional responses as further proof of competence</li> </ul> <p>The minimum percentage of correct responses expected is specified.</p>	<p>May be necessary to have follow-up conversations because:</p> <ul style="list-style-type: none"> <li>▪ The conversation was interrupted</li> <li>▪ Assessor or PM or BO was not feeling physically or mentally well</li> <li>▪ Assessor or PM or BO or both feel that a third party needs to be included</li> </ul>

## Competency conversation – example

In the driveway repair scenario cited previously, the PM has to have sufficient knowledge about how to repair a driveway to manage a contractor(s) to complete the work.

Step 2 of the seven-step assessment procedure is to specify a need. Let's assume that repairing driveways is not something that is done frequently, so the owner needs to determine if the PM has sufficient knowledge about how to repair a driveway to be able to manage a contractor.

The next step in the procedure is to select an instrument and a Competency Conversation instrument is chosen. Here's what that instrument might look like to assess part of a PM's background knowledge of driveway repair.

<b>Competency conversation</b>		
<i>Task: Repair a driveway to a single. commercial building. Conditions:</i>		
<b>Purpose:</b> Assess the PMs ability to identify the need to repair a driveway.		
<b>Subject:</b> Background knowledge of a driveway's purpose, position, shape and typical use.		
<b>How knowledge will be assessed:</b> The PM must be able to:		
<ul style="list-style-type: none"><li>▪ Describe the driveway's purpose, position and shape.</li><li>▪ Explain the typical use of the driveway in terms of traffic volume, type of vehicles, etc.</li></ul>		
Questions	Competent	Not Yet Competent
Describe the purpose of the driveway.	<input type="checkbox"/>	<input type="checkbox"/>
What is the driveway's current position and shape relative to the building?	<input type="checkbox"/>	<input type="checkbox"/>
How is the driveway typically used?	<input type="checkbox"/>	<input type="checkbox"/>
Describe the key measures of traffic volume and type of vehicles.	<input type="checkbox"/>	<input type="checkbox"/>
How would you describe the driveway's current state or condition?	<input type="checkbox"/>	<input type="checkbox"/>
What constitutes a useable driveway?	<input type="checkbox"/>	<input type="checkbox"/>
Comments:		
<hr/>		
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## Exam – development guidelines

An **exam** is a common way of assessing knowledge – primarily but not necessarily exclusively based on recalling information. It is a series of exercises that test knowledge of key elements of a specified subject.

An exam typically comprises any combination of five types of questions, each one testing a different ability and type of information. They are, in increasing order of difficulty:

- Fill-in-the-blank (ability to recall words from memory, and if necessary, spell them correctly)
- Short answer (ability to answer a knowledge question by recalling information from memory and expressing it in a short, clear statement)
- True/false (ability to interpret whether a statement is expressed accurately)
- Multiple choice (ability to sort provided lists into groups or select the best completion of an incomplete statement of fact or process)
- Matching (ability to associate provided statements or labels with groups or images)

As adults in the workplace, any practitioner will be familiar with exams from their school experience and their post-secondary preparation for entry into the occupation.

However, it is important to note that exams are typically associated with negative personal feelings that must be accommodated. Therefore, exams are rarely used to assess someone's knowledge. They are used only when deemed necessary – when there is a clear need to measure whether a person can recall necessary information from memory and/or can describe its practical application to a task or set of tasks.

Some simple guidelines to conduct an assessment using an exam appear on the following page.

Delivery	Conditions	Follow-up
<p>Organized, structured and purposeful.</p> <p>Conducted in an open manner that addresses perceptions that may be held by the person being examined:</p> <ul style="list-style-type: none"> <li>▪ <b>The person may worry that the exam is punitive (assure them that it does not punish them for doing something wrong or not knowing how to do something)</b></li> <li>▪ <b>The person may be uncertain about why the exam is important (explain why it is being given)</b></li> </ul>	<p>Purpose of the exam is explained:</p> <ul style="list-style-type: none"> <li>▪ Why is it being conducted (reason for it)</li> <li>▪ The subject of the exam</li> <li>▪ How knowledge will be assessed (key facts, concepts, procedures, formula, etc., that reflect the criteria)</li> </ul> <p>The assessor conducting the exam is qualified:</p> <ul style="list-style-type: none"> <li>▪ Highly skilled in invigilating examinations</li> <li>▪ Highly skilled in interpersonal relations skills (can manage feelings if necessary)</li> </ul> <p>The conditions under which the exam is conducted are controlled:</p> <ul style="list-style-type: none"> <li>▪ PM or BO is assessed individually</li> <li>▪ Environment is safe and independent (not the actual working environment, as it may present distractions or stress)</li> <li>▪ The exam has been peer reviewed by qualified practitioners</li> <li>▪ The minimum percentage of correct responses expected is specified</li> </ul>	<ul style="list-style-type: none"> <li>▪ May be necessary if the person does not meet the minimum percentage of correct responses</li> <li>▪ The person may be given another chance to complete the exam and meet the minimum</li> </ul>

On the assumption that the exam format is familiar to everyone, a sample is not provided.

### Composition – development guidelines

Whereas an exam is usually focused on the ability to recall information, a written **composition** is usually focused on the ability to not only recall information but also explain its use in a practical situation. In doing so, the practitioner must apply appropriate recalled knowledge, such as the names of equipment, tools, materials, etc.

Typically, the practitioner composes (writes) a document such as an essay or report that addresses criteria to demonstrate their practical application to a task or set of tasks.

In many respects, this is a creative exercise. There is no “right” answer. Rather, the writer must be able to use their knowledge to describe something – a solution, application, practical use, etc.

**Note:** As a side purpose, which should not be confused with the reason for assessment, the resulting document(s) may be used by the employer for promotion and communication purposes.

Here are some simple guidelines to conduct an assessment using a composition.

Delivery	Conditions	Follow-up
<ul style="list-style-type: none"> <li>▪ Requested of a person – e.g., a research assignment or a project</li> <li>▪ Intent and use of the finished product are specified</li> </ul>	<p>Purpose of the composition is explained:</p> <ul style="list-style-type: none"> <li>▪ Why is it being used (reason for it)</li> <li>▪ The subject of the composition</li> <li>▪ How knowledge will be assessed (key information about the subject that reflects the criteria is cited)</li> </ul> <p>The assessor reviewing the composition is qualified:</p> <ul style="list-style-type: none"> <li>▪ Highly skilled at troubleshooting and problem-solving</li> <li>▪ Highly skilled at writing compositions for a wide variety of purposes</li> <li>▪ Highly skilled in both verbal and non-verbal communication (to communicate results of the assessment)</li> <li>▪ Experienced at reviewing compositions</li> </ul> <p>The conditions under which the resulting composition is reviewed are controlled:</p> <ul style="list-style-type: none"> <li>▪ PM or BO is assessed individually (not in a group)</li> <li>▪ The minimum percentage of criteria to be met is specified</li> </ul>	<ul style="list-style-type: none"> <li>▪ May be necessary if the person does not meet the minimum percentage of criteria</li> <li>▪ Revision or repurposing may be required if the composition is to be used for communications purposes</li> </ul>

### Composition – example

Using the same assumptions and rationale stated for the competency conversation, the owner requests that the PM prepare a composition in the form of a report that documents the results of research the PM has conducted on how to repair a driveway to their single commercial building.

Here is an example of an instrument to assess the PM's background knowledge of driveway repair.

***Composition (Research Project)***

**Task:** *Repair a driveway to a single, commercial building. Conditions:*

**Purpose:** Assess the PM's ability to document the results of research conducted on how to repair a driveway to their single commercial building.

**Subject:** Background knowledge of what constitutes a useable driveway

**How knowledge will be assessed:** The person must be able to prepare a report that provides:

- Research on how to determine the need to repair a driveway
- Recommendations on the activities that need to be included in a contract to manage the repair of a driveway

Criteria	Competent	Not Yet Competent
The report demonstrates appropriate knowledge about: <ul style="list-style-type: none"> <li>▪ Driveways to single buildings and their typical use</li> <li>▪ Typical composition of a driveway</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
The report provides appropriate research about: <ul style="list-style-type: none"> <li>▪ Typical features of a driveway's conditions that indicate the need for repair</li> <li>▪ What constitutes a useable driveway</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
The report provides appropriate recommendations about: <ul style="list-style-type: none"> <li>▪ What needs to be done to return a driveway to a useable condition</li> <li>▪ How to determine if the repaired driveway will serve its original needs</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>

Comments:

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### Situation analysis – development guidelines

This instrument also requires the practitioner to be somewhat creative. Although a realistic situation is the focus of the assessment, there is no "right" answer. Rather, the practitioner must be able to use their knowledge to analyze the situation and create an appropriate solution. In many respects, this instrument is an extension of troubleshooting and problem solving.

A **situation analysis** is often referred to as a heuristic (a set of concepts or principles to apply as “things to consider” or “rules of thumb”) as opposed to an algorithm (a procedure to follow accurately).

The practitioner reviews a realistic situation that describes a situation that occurs on the job. Then they identify considerations based on their knowledge (heuristic) that could be considered to resolve the situation. Then they write a proposed solution.

Here are some simple guidelines to conduct an assessment using a situation analysis.

Delivery	Conditions	Follow-up
<ul style="list-style-type: none"> <li>▪ Requested of a person as a result of observation or introduction of something new</li> <li>▪ Explained as a hypothetical situation but it has application to the person’s “real world”</li> </ul>	<p>Purpose of the situation analysis is explained:</p> <ul style="list-style-type: none"> <li>▪ Why is it being used (reason for it)</li> <li>▪ The subject of the situation analysis</li> <li>▪ How knowledge will be assessed (application of conditions in the situation; use of background knowledge that reflects the criteria)</li> </ul> <p>The assessor reviewing the situation analysis is qualified:</p> <ul style="list-style-type: none"> <li>▪ Highly skilled in troubleshooting and problem solving</li> <li>▪ Highly skilled at analyzing situations to arrive at solutions</li> <li>▪ Highly skilled in both verbal and non-verbal communication (to communicate results of the assessment)</li> <li>▪ Experienced at reviewing situation analyses</li> </ul> <p>The conditions under which the results of the situation analysis are reviewed are controlled:</p> <ul style="list-style-type: none"> <li>▪ PM or BO is assessed individually</li> <li>▪ Environment is safe and independent (not the actual working environment, as it may present distractions or stress)</li> <li>▪ The conditions cited in the situation and the appropriate potential solutions have been peer reviewed by qualified practitioners</li> <li>▪ The minimum percentage of criteria to be met is specified</li> </ul>	<ul style="list-style-type: none"> <li>▪ May be necessary if the person does not meet the minimum percentage of criteria</li> <li>▪ Revision or repurposing may be required if the situation analysis is to be used for communications purposes</li> </ul>

### Situation analysis – example

Instead of the other two knowledge-based instruments, assume that the owner requests that the PM to complete a situation analysis to demonstrate if the PM possesses sufficient knowledge about assessing the need for a driveway repair and how to go about it.

Here is an example of an instrument to assess the PM’s knowledge.

### *Situation analysis*

*Task: Repair a driveway. Conditions:*

**Purpose:** Assess the person’s ability to identify a real driveway repair situation for their single commercial building and explain a process to complete the repair.

**Subject:** Background knowledge of the impact of not repairing a driveway that requires it.

**How knowledge will be assessed:** The person must be able to prepare a document that rationalizes:

- Their understanding of the urgency of repairing the driveway
- Their decision (i.e., that it accurately reflects the conditions in the situation)

Criteria	Competent	Not Yet Competent
The person clearly understands the situation: <ul style="list-style-type: none"> <li>▪ Current condition of the driveway (what needs to be done to return the driveway to a useable condition)</li> <li>▪ The driveway’s composition (component parts, materials, etc.)</li> <li>▪ Impact of not making the repair</li> <li>▪ Impact of delay</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
The person considers appropriate variables: <ul style="list-style-type: none"> <li>▪ Urgency – when the driveway has to be repaired</li> <li>▪ Time required to make the repair</li> <li>▪ Their understanding of contractor requirements (selecting a company or individual(s), scheduling, invoicing, payment, etc.)</li> <li>▪ Expertise and availability of approved contractors</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
The solution is explained in a way that accurately addresses the situation.	<input type="checkbox"/>	<input type="checkbox"/>

Comments:

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## Guidelines for Developing Skill-Based Instruments

As mentioned previously, the three instruments used to assess skill are a checklist, a rating scale and a rubric, all of which are administered by asking a person to perform a task or set of tasks, observing them performing a list of criteria, and analyzing their performance.

Of the three, the checklist is the most commonly used instrument to assess skill. The other two are used for tasks that are sensitive, complex and have elements that require qualitative assessment.

Like knowledge-based instruments, skill-based instruments have to be developed and documented so they can be administered consistently. Following are guidelines for developing each instrument, and examples based on the driveway repair scenario.

### Checklist – development guidelines

A **checklist** is a quantitative instrument consisting of a list of items to be checked off by an assessor observing a PM or BO performing a practical task(s).

The three most recognizable characteristics of a checklist are:

- A list of steps in a procedure, behaviours of a protocol, or features of a finished product
- A blank space accompanying each step, behaviour, or feature to indicate completion of the step, behaviour, or feature
- Space for the observer to write remarks or comments explaining why the steps, behaviours, or features were checked off or left blank

### Checklist – example

In the driveway repair scenario cited previously, one of the skill-based competencies the PM has to demonstrate is create a contract for the services of a contractor(s) to complete the work.

When selecting an appropriate instrument, let's assume the owner needs to determine if the PM has the ability to create and manage the contract. To make this determination, a checklist is selected.

Because several examples of checklists have been provided previously, a sample is not provided here.

### Rating scale – development guidelines

A **rating scale** is very similar to a checklist and is sometimes referred to as a checklist with qualifiers. This instrument requires both a yes/no observation (checklist) and an objective judgment as can be made by the observer (rating scale). In other words, a rating scale is used not only to determine whether an activity was performed, but also, how well.

A rating scale is the most commonly used instrument for assessing performance qualitatively.

The three most recognizable characteristics of this instrument include:

- A list of steps in a procedure, behaviours of a protocol, or features of a finished product
- A scale of numbers positioned as “bookends” of opposing criteria for each step, behaviour, or feature
- Space for the observer to write remarks or comments explaining their rationale for rating steps, behaviours, or features

A best-practice rating scale has an odd number of points from minimum to maximum. This permits an assessor to express what constitutes the “middle” between the opposing criteria. Although 3 is an odd number, it is usually too restrictive to permit accurate measurement. And although 7 is also an odd number, a range from 1 to 7 is usually considered too detailed. Consequently, 5 is commonly used.

### Rating scale – example

Following the decision by the owner to assess whether the PM has the ability to create a contract to repair the driveway, assume that the owner not only wants to determine if the PM can create a contract, but also how well the contract can be created. Because this task is to produce a product, not a follow a procedure or conduct a human interaction, the owner selects a rating scale.

Here is an example of an instrument to assess the PM’s ability to create a contract. Both the PM and the assessor must know what the criteria are. A score of 1 represents the poorest demonstration of a feature, and 5 represents the best.

**Rating Scale**

**Task:** Create a contract to repair a driveway.

The contract includes the work parameters (work to be done, timeline and deliverables).

Only includes the three parameters (no details)	1	2	3	4	5	Includes details by which each parameter can be measured
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The contract was signed off by the owner.

Some time after commencing work	1	2	3	4	5	Prior to commencing work
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The contract was administered.

According to verbal reports by the contractor	1	2	3	4	5	According to observation of work completed and accuracy of completion
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A report of the contract was filed.

Included only elements completed	1	2	3	4	5	Including elements completed accurately and on time and areas requiring improvement
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Comments: *Complete only to explain a rating and/or to qualify why an action was not rated.*

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### Rubric – development guidelines

A **rubric** may be used when there is a need to examine a step, behaviour, or feature using details that go beyond a rating scale. This instrument is commonly used to assess the features of a product, which can be challenging due to the subjectivity of the qualifiers.

For example, if you had to produce a product that was smooth, that quality would need to be defined more specifically.

A rubric is another qualitative instrument used for assessing performance. It is not used as frequently as a rating scale because it is much more detailed and harder to construct. So, it tends to be used only for tasks or parts of a task that involve specific, detailed action.

### Rubric – example

Here's an example for one of the actions taken by a PM in the driveway repair scenario to create a contract. In this example, the assessor uses a rubric to rate a finished product, not a procedure or protocol. Both the PM and the assessor must know what the criteria and performance indicators for the contract are. A score of 1 represents the poorest demonstration of a feature, and 5 represents the best.

Criteria	Ratings/Performance Indicators/Scores				
	1	2	3	4	5
The contract ...					
includes the work parameters (work to be done, timeline and deliverables)	Does not include all parameters and is not for an approved vendor	Includes 2 of 3 parameters	Includes all 3 parameters	Includes all 3 parameters and is for an approved vendor	Includes all necessary parameters, is for an approved vendor, and has additional elements that add quality
was signed off by the owner	Was not signed off prior to starting work	Was signed off on the day work started	Was signed off 1 week ahead of starting work	Was signed off 2 weeks ahead of starting work	Was signed off 2 weeks ahead of starting work and accommodated changes due to prevailing circumstances
was administered	Behind schedule without PM oversight	According to the schedule with minimal PM oversight	On time according to the schedule with moderate PM oversight	On time with full PM oversight	Ahead of schedule and with full PM oversight
was filed	Late and incomplete	Late with notes of dates tasks completed	Upon completion of work with notes of dates tasks completed	Upon completion of work with notes of dates tasks completed as well as accuracy and timeliness	Upon completion of work with notes of dates tasks completed as well as accuracy and timeliness and a report of where improvements could be made

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