

Commercial Property and Facilities Management Occupational Standards Report

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Prepared by Siena Consulting



Building Owners and Managers
Association of British Columbia

Canada



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TABLE OF CONTENTS

| | |
|---|------------|
| Introduction | 3 |
| Section 1 – Project OVERVIEW | 5 |
| Background | 5 |
| Challenges | 6 |
| Development Process | 7 |
| Section 2 – Competency-Based Learning and Assessment | 13 |
| Competencies | 13 |
| Behaviours | 13 |
| Attributes | 14 |
| Types of Competencies | 15 |
| Section 3 – Occupation Profiles | 21 |
| Building Operator Occupation Profile | 22 |
| Property Manager Occupation Profile | 23 |
| Section 4 – Competency Profiles | 24 |
| Building Operator | 25 |
| Property Manager | 51 |
| Section 5 – Occupational Standards..... | 74 |
| Industry Employment | 74 |
| Learning and Development..... | 74 |
| Performance Assessment..... | 75 |
| Assessment Framework..... | 77 |
| Section 6 – Observations | 79 |
| Nomenclature | 79 |
| Observations | 79 |
| Appendix | 83 |
| Governance Advisory Committee | 83 |
| Key Informant Interviewees..... | 84 |
| Job Task Analysis Participants | 84 |
| Occupation Profiles | 86 |
| Building Operator | 87 |
| Property Manager | 103 |
| Job Descriptions | 123 |
| Job Description – Building Operator | 124 |
| Job Description – Property Manager | 127 |
| Glossary | 130 |

INTRODUCTION

This Occupational Standards Report (OSR) is a description of activities conducted during Stage 3 of the BOMA BC Sector Talent Strategy Implementation project, and the results. Specifically, it describes the Commercial Property and Facilities Management industry's desire to develop competency-based profiles of the Property Manager (PM) and Building Operator (BO) occupations. These profiles are intended to inform the development of assessment and learning frameworks that existing and newly hired PMs and BOs could use to determine areas of their performance that need attention and find learning resources to support their development.

The report consists of seven parts:



The **Project Overview** section includes a detailed outline of the project, including its background and challenges, intended outcomes, deliverables, and the development and validation processes followed to develop them.

The **Competency-Based Learning and Assessment** section describes the basic concepts and principles that act as a guide to developing the project's assessment and learning framework. These principles comply with the *Guidelines for Developing Outcome-Based Competence Systems*¹.

¹ 2017. Government of Canada/Government of British Columbia. Canada-British Columbia Labour Market Agreement. *Developing Outcome-Based Competence Systems*. Version 1.0. July 17, 2017.

The **Occupational Profiles** section describes the duties, tasks, and steps associated with the Property Manager (PM) and Building Operator (BO) occupations.

The **Competency Profiles** section specifies the competencies that PMs and BOs are expected to demonstrate when performing the duties and tasks associated with their occupations. The section also includes a separate competency profile for each occupation.

The **Occupational Standards** section is a framework for standards for the Commercial Property and Facilities Management sector, including the evidence and assessment criteria, how instruments are selected, and the conditions under which assessments occur.

The **Observations** section includes some observations made when developing the deliverables, including what stands out about the educational backgrounds of BOs and PMs, the educational landscape for potential employees, and the implications (for individual employers as well as the industry at large) of incorporating competency profiles into employee assessment.

The **Appendix** section has a glossary of terms used in this report, full versions of both the occupation profiles and competency profiles for PMs and BOs, and potential job descriptions for PMs and BOs.

SECTION 1 – PROJECT OVERVIEW

Background

The roots of this project go back to March 2017 when BOMA BC commissioned a Labour Market Information research project, funded through the Sector Labour Market Partnership program administered by the BC Ministry of Advanced Education, Skills and Training. The study revealed a talent shortage for key occupations in the commercial real estate labour force. Eight occupations, under two umbrella categories, Property Manager (PM) and Building Operator (BO), were identified as key occupations for which there will be increasing demand in the coming decades.

Building on this research, in June 2018 BOMA BC completed a Strategy Development project, which surfaced a number of workforce challenges confronting the sector, including: lack of a visible brand or presence to identify itself and any employment opportunities; poorly defined career paths for people currently employed in the industry, leading to difficulties with recruitment and retention; loose definition around job titles and descriptions, with significant variance across companies; low awareness among students, parents, career counsellors and post-secondary institutions of occupations in the industry; limited alignment between the industry and educational institutions, leading to confusion among potential candidates seeking to attain the relevant skills to gain employment in commercial property management or building operations; and a lack of competency-based training for the roles – i.e., existing educational offerings often do not map to the duties and tasks performed by BOs and PMs.

The outcome of this body of work was a sector talent strategy focused on identifying, attracting, recruiting, developing, and retaining the people needed to work in PM and BO roles in the industry in the next decade. Among the recommendations in the report was one suggesting the building of a competency-based, industry-recommended assessment and learning framework that reflects industry standards for the two key occupations.

The framework could serve as a foundation and point of reference upon which:

- Future competency-based education and training programs could be built
- Existing learning resources could be aligned to provide interim learning support
- Competency-based assessment strategies and tools could be developed for identifying the learning and development needs of existing employees
- Clear career paths for people interested in pursuing employment in the two key occupations could be defined

This OSR is one of the building blocks of the framework.

Challenges

The project team identified two main challenges in developing the assessment and learning framework.

BOs and PMs do not currently exist as standardized titles with standardized job descriptions for which people are currently employed or can be hired – they are umbrella categories for an assortment of occupations. Nevertheless, they represent people who are responsible for operating a property and/or managing it. In addition, these are two occupations that could be standardized in the future as employers begin to use the framework and the industry starts to become more structured and standardized.

Because standardized competency profiles do not exist, specific, standardized **competency-based training for the BO and PM occupations does not currently exist**. Nevertheless, the competency profiles developed for BOs and PMs should be considered as currently acceptable by industry stakeholders and useful for assessing incumbent employees' competence as well as that of new hires to work in these occupations.

Consequently, the competency profiles that have been developed for these two occupations represent the standards by which people performing these occupations can be trained, observed, assessed, and supported.

It is important to establish standards because it has been discovered both in this and previous phases that existing written industry standards are inconsistent and diverse.

Proof of this inconsistency was revealed in the previous stage – Literature Review and Environmental Scan – which showed a wide diversity of subjects among existing educational offerings relevant to the Commercial Property and Facilities Management sector. This variety was also confirmed by participants interviewed during this phase. They stated that the lack of standards is the result of non-standardized education and training and prerequisite experience.

Development Process

This project is a collaborative effort involving BOMA BC, the BC Ministry of Advanced Education, Skills and Training, and a Governance Advisory Committee (GAC) comprising industry experts and various subject matter experts who made themselves available throughout the process. Project support has been provided by Siena Consulting.

Following the development of a Project Management Workplan (submitted March 27, 2020) and Literature Review and Environmental Scan (submitted April 24, 2020), four key deliverables were identified: Draft BO and PM Occupational Standards Report, Draft Competency Assessment Framework, Draft Educational Resources Framework (Catalogue), and Draft Career Path Tool.

To complete the Occupational Standards Report, a five-step process was followed.



Project Kick-Off

To complete Step 1, an initial project kick-off session was held on March 30, 2020. This meeting was attended by BOMA BC project leaders, Siena Consulting Inc. development and communications team, and members of the GAC (see [Kick-Off Meeting Participants](#) in the Appendix). The committee is composed of individuals currently employed in the Commercial Property and Facilities Management sector of the industry. It is important to note that these individuals did not participate in the data-gathering activities. However, as people with industry experience, they are able to provide feedback that is relevant to the project.

The kick-off meeting was held via the Zoom videoconferencing platform (Zoom) because the members of the GAC are located in various jurisdictions and different time zones across Canada, and also to follow the COVID-19 pandemic recommended protocols.

The purpose of the meeting was to identify the backgrounds, roles, and responsibilities of the teams; and to obtain agreement on the major activities to be conducted, deliverables to be prepared, and communications mechanisms by which information and queries could be made and draft deliverables could be shared and reviewed.

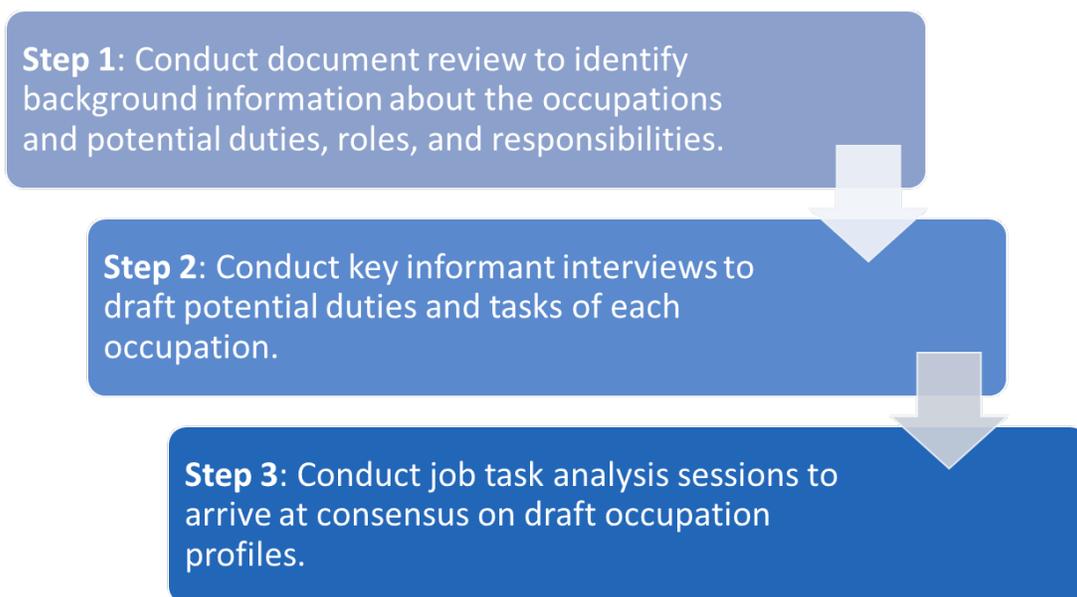
It was agreed that feedback provided by the GAC on successive project deliverables was important and would be primarily of three basic types:

- Terminology and grammatical wording that improves the intended meaning of specific statements, especially behaviours
- Questions about process
- Suggested inclusions or corrections to stated tasks, competencies, and/or behaviours

To enable information sharing, document sharing and feedback, a virtual community was established on the Property Management Institute of Canada (PMIC) website, consisting of GAC members and the Siena Consulting group. The project team posts regular messages to the community regarding each deliverable. This enables the project team to provide advance notice of an upcoming deliverable and request that members be available to provide feedback and answer specific questions about the deliverable. Documents are posted approximately one week before being finalized, allowing members time to provide feedback and the project team to integrate any changes that result. Community members have the option to reply via the PMIC portal or via email.

Occupation Profiles

Occupation profiles describe the areas of responsibility, tasks performed, knowledge and skills required, and conditions in the working environment in which the occupation is performed. A three-step process was followed to develop the occupation profiles for PMs and BOs:



The document review occurred from April 1 to 24, 2020 and involved collecting data from a variety of sources including:

- Society of Chartered Surveyors (SCSI) Property Management Pathway Guide
- BOMI Commercial Real Estate Property Manager Job Task Analysis (June 2018)
- 2011 Building Operator Scoping Study
- BOMA BC Deloitte Final Report
- BOMA BC Sector Talent Strategy
- Royal Institution of Chartered Surveyors (RICS) Commercial Property Management Pathway Guide Associate
- Local, national, and international websites

The data collected in this step was assembled, consolidated, and organized into a rough list of potential duties and tasks that might be considered appropriate for each occupation. Input was also received from BOMA BC project leaders.

Key informant interviews were conducted on May 8 and 12, 2020 and involved four individuals (two from each occupation) who were identified by BOMA BC as key informants to participate in the interviews (see [Key Informant Interviewees](#) in Appendix).

The purpose of the key informant interviews was to discuss the PM and BO roles at a high level and single out categories of responsibility for each. Each pair of interviewees was sent the rough list of duties and tasks to review in advance of a facilitated meeting. Participants were asked to review the prepared list as a starting point to identify a handful of “buckets” for various tasks that they perform. Over the course of these two-hour interviews, the BOs came up with five categories and the PMs arrived at six. These were summarized and sent via email to the participants to validate, provide feedback, and suggest any adjustments or new ideas that had occurred to them since the interviews in preparation for the follow-up data-gathering job task analysis sessions. Input was also received from BOMA BC project leaders.

Job task analysis sessions (JTAs) were conducted on June 3 and 9, 2020. In preparation, invitations were sent via email to six PMs and eight BOs – including the key informant interviewees for each role – and attendance was confirmed by five PMs and four BOs (see [JTA Participants](#) in Appendix). The results of the key informant interviews were sent to the participants to use as a starting point in facilitated JTAs. These were highly productive conversations and each yielded not only a more refined list of duties but also a detailed list of tasks nested under each duty, as well as additional detail about steps and/or elements of each task. As well, the participants shared their thoughts on the knowledge, skills, and background necessary to perform each of the roles successfully.

During the period June 6–17, 2020 a summary of each JTA session was circulated to the participants, as well as invitees who had not been able to attend, for validation and feedback

(total eight BOs and six PMs; see [JTA Participants](#) in Appendix). Input was also received from BOMA BC project leaders.

Based on the responses, the duties were adjusted to six for the BOs and five for the PMs. In the case of the BO role, a new duty was created out of tasks that had initially been included within other duties. In the case of the PM role, two proposed duties were subsumed into other duties. Over the course of two weeks, participants (as well as invitees who hadn't been able to attend) provided their feedback via email – in some cases mentioning additional tasks that hadn't been thought of during the JTA sessions, and the notes from the sessions were updated to reflect this feedback.

The notes were then used to finalize the occupation profiles and inform the construction of potential job descriptions for the PM and BO roles (see [Job Descriptions](#) in Appendix), which were tested with the JTA participants and adjusted based on their feedback. Feedback was also provided about some of the details included in the **Steps** part of the occupational profiles, all of which was used to finalize the drafts.

Competency Profiles

Competency profiles build on occupation profiles in that they specify the competencies necessary to conduct duties, tasks, and steps/elements of an occupation and, more importantly, the behaviours that provide evidence of successful performance. A three-step process was followed to develop the competency profiles, also known as “units of competence,” for the two key occupations:

Step 1: Review occupation profiles to identify competencies and associated behaviours that could be used to observe and measure duties and tasks performed by BOs and PMs.

Step 2: Determine a framework for organizing and displaying competencies and behaviours for implementation.

Step 3: Develop a competency profile for each occupation profile.

The occupation profiles were analyzed carefully to identify the competencies that applied to each task. The tasks and their composite steps were reviewed and grouped according to their applicability to the competencies. Where clarity was needed, the JTA notes were examined.

During the period June 15–24 the resulting competency profiles were sent for review and feedback by the expert group used in the preliminary interviews and job task analysis sections on an iterative basis. Suggestions were made about some of the groupings of behaviours and some competencies named for tasks.

Occupational Standards

Occupational standards describe what employees must know and be able to do, and to what level, to perform an occupation successfully.

During the period June 24–30, 2020, the PM and BO competency profiles were analyzed to inform the development of occupational standards for the industry. It was determined that standards were necessary to serve several purposes including employment, learning and development, and performance assessment.

Descriptions of the evidence that is required to indicate competence, as well as an outline of how evidence is to be collected, were developed. This resulted in a framework to guide the implementation of performance assessment and the development of the draft OSR.

Report Findings to the GAC

The draft Occupational Standards Report was submitted to the GAC on July 3, 2020 for review, feedback, and advice for going forward. Input received resulted in changes to the OSR primarily in terms of language and terminology, which resulted in the development of a glossary.

Feedback about terminology and grammatical wording was relatively light and was integrated into the draft. Questions about process were also relatively few in number and have been used to revise parts of the report, especially statements describing the process of collecting and validating data. Feedback in the form of suggested inclusions or corrections to stated tasks, competencies, and/or behaviours was more substantial and largely technical in nature.

An official draft version of the OSR was submitted to the Ministry of Advanced Education, Skills and Training on July 10, 2020.

Validation Process

BOMA BC and the GAC ensured that the process used and the results achieved were valid, that input was received from a variety of sources, that subject matter experts were solicited, and that the industry was engaged in the process from start to finish.

To ensure that the information gathered for this project accurately reflected the Commercial Property and Facilities Management sector, documents, websites, and other materials that were used for background research and preliminary development of occupation profiles came from:

- Recommendations from the GAC and BOMA BC project leaders
- Previous deliverables of the Labour Market Information research project:
 - > BOMA BC Sector Talent Strategy Progress Report
 - > Literature Review and Environmental Scan

To ensure that the input, feedback, and advice provided was an accurate representation of both the industry and, more importantly, the current reality of activity in BC communities, two measures were taken:

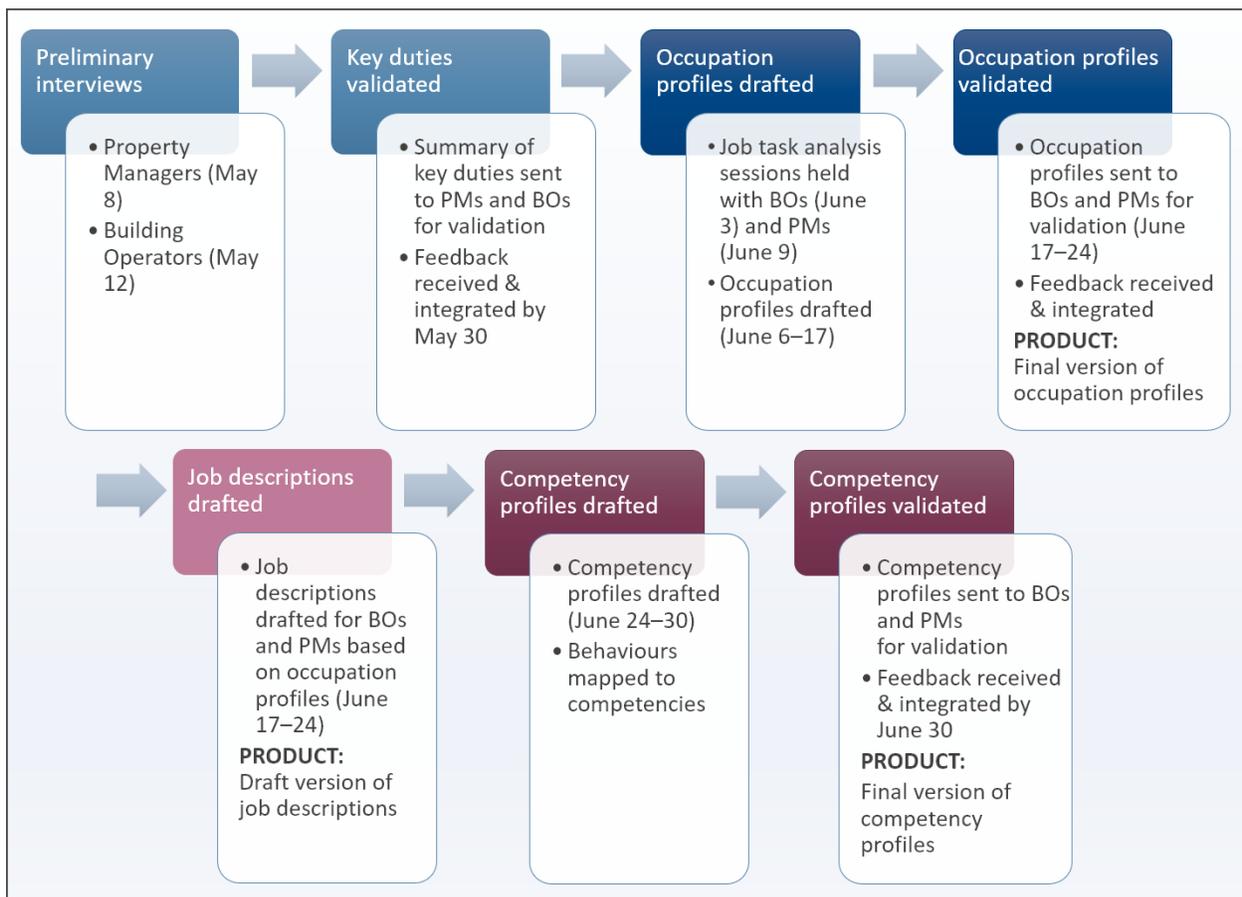
- > Review and input were solicited from the GAC and BOMA BC project leaders.
- > The participants referred by BOMA BC to participate in interviews, data-gathering sessions and drafts review were people currently working as PMs and BOs who have extensive experience in their respective roles, have demonstrated expertise, and are respected by their industry peers.

Furthermore, these individuals are respected subject matter experts in their respective occupations. These PMs and BOs are senior-level employees, and the experience they reported (including duties and tasks that may not apply to all PMs and BOs) should be considered more fulsome than a junior PM or BO might report, thereby representing the “umbrella” nature of the occupations.

In an effort to reflect the industry as accurately and completely as possible, these practitioners were selected to represent a cross-section of the industry in BC in terms of geographical, building/asset type, and urban and rural perspectives.

To ensure that the deliverables were consistent and that all input was integrated collaboratively, an iterative process was followed.

The illustration following shows the entire development and validation process.



SECTION 2 – COMPETENCY-BASED LEARNING AND ASSESSMENT

Because competency-based learning and assessment is new to the industry, it is important to understand what competencies are and how they can be used to help people learn what it means to perform the tasks of an occupation competently, and subsequently assess their performance.

Competencies

Competencies are outcome statements about the knowledge, skills, and attributes a person must be able to demonstrate when performing an occupation. Because the BO and PM occupations are umbrella categories for an assortment of occupations, competencies are used to inform practitioners what they are required to do to demonstrate competence on the job regardless of how they acquired their competence.

Competencies also inform a framework by which an employee's growth and development can be supported as they perform their job and build a career.

And competencies can be used as a guide to making decisions about entering and making changes in employment within the industry.

Sample competency statements:

- A Property Manager must prepare and maintain a capital budget for a property using planning and prioritization, budgeting, financial management, interpersonal relations, and document management skills.
- A Building Operator must forecast repairs for a property using planning and prioritization, decision making, and budgeting skills.

Behaviours

But competence is not an act and cannot be easily observed and measured. So behaviours also need to be specified that define what it looks like to perform job tasks in the workplace.

A competency is a person's ability to display what they know (knowledge), their expertise (skills), and their feelings or other personal qualities (attributes) about performing a specific activity. Behaviours are the way a competency can be observed and measured in practice (performance requirements).

Sample behaviours:

Planning and prioritizing a capital budget for a property by a Property Manager is demonstrated by:

- Reviewing the management/owner's plans and goals, including construction to replace or upgrade large projects (e.g.: upgrading the building envelope) to create efficiency and value, and adding a new component to the property (e.g.: building a parking lot in a multiple/mixed-use property or a driveway to a single building)
- Reviewing five- to 10-year costs

Budgeting forecasted repairs for a property by a Building Operator is demonstrated by:

- Obtaining input from members of security, janitorial, management/owner, etc.
- Estimating costs of repair, replacement, and upgrades

Attributes

Any occupation usually involves broad aspects that employees must keep in mind when performing any task. They are not competencies – they are overall attributes that represent important aspects of the job function.

Consequently, these attributes are not listed in a competency profile as job-specific competencies. Rather, they are used when assessing a person's ability to perform a task or set of tasks.

Sample attributes:

When planning and prioritizing a capital budget and forecasting repairs for a property, Property Managers and Building Operators must demonstrate several attributes including but not limited to:

- Assuming a clear sense of ownership
- Taking personal responsibility for decisions, actions, and failures
- Maintaining confidentiality with sensitive information
- Acknowledging and learning from mistakes without blaming others

Competencies are not intended to create a barrier for people wishing to enter the workforce. Rather, they are intended to inform and provide guidance for the development of:

- Job descriptions
- Performance support and improvement interventions
- Learning and development programs
- Certification standards

Observed behaviour is how evidence is obtained and measured. Evidence must be relevant to be useful – valid, sufficient, current, and authentic.

Types of Competencies

The occupation profiles for the PMs and BOs were analyzed carefully to identify the competencies and associated behaviours by which the tasks they perform could be observed and measured.

The analysis revealed competencies that are:

- Business-focused (related to business operation)
- Job-specific (related to the tasks of the job itself)

Business-Focused

The PM and BO occupations are performed in the context of running a business. As such, PM and BO jobs involve business administration tasks such as time tracking, office routines, record keeping and reporting about contractor work, equipment, machinery, and systems repair, and many other responsibilities.

Some employers may hire administrators to manage this part of their business. Whether or not an employer hires such a person, PMs and BOs must provide administrative input.

Consequently, this is included in the competency profiles as a competency called *Document Management*.

Job-Specific

Both profiles have several competencies that apply to the specific duties and tasks that must be performed – ones that must be learned, refined, and developed continually to ensure that everyone who performs the occupation does it consistently.

There are 13 competencies that PMs and BOs must be able to demonstrate when performing the duties and tasks of their occupation.

In the competency profiles, each competency has an icon to help readers get an at-a-glance sense of what each duty/task entails. The intention is to enable the reader to scan quickly for particular competencies of interest (for example, if comparing one duty to another or one role to another, or to identify clusters of competencies that tend to occur together).

| The competency | is the ability to ... |
|--|--|
|  Organization and time management | Identify requirements and schedule activities that ensure productivity. |
|  Planning and prioritization | Identify resources needed to complete activities and sequence them to achieve goals. |
|  Interpersonal relations | Build positive, respectful relationships with others that enable efficient and successful interaction. |

| | | |
|---|-----------------------------------|---|
|  | <p>Communications</p> | <p>Prepare a message using language the receiver can understand; send information in written, verbal and non-verbal form; listen and understand feedback; ensure requests and work orders are closed out with appropriate information to reference at a later time.</p> |
|  | <p>Decision making</p> | <p>Make decisions in a timely manner and demonstrate responsibility and commitment.</p> |
|  | <p>Collaboration and teamwork</p> | <p>Identify activities requiring teamwork; determine roles and responsibilities; solicit and assign appropriately skilled personnel; carry out team tasks while respecting the roles and responsibilities of others.</p> |
|  | <p>Critical thinking</p> | <p>Think about a topic or issue in an objective, logical, sequential, disciplined way to analyze, evaluate, interpret, and rationalize information and make informed judgments and/or decisions.</p> |
|  | <p>Education and training</p> | <p>Identify learning needed by staff, vendors, tenants, and/or contractors, then develop and deliver presentations and learning activities, plus acquire needed personal knowledge and skills to maintain awareness, reduce risk, and improve productivity.</p> |
|  | <p>Document management</p> | <p>Use general and specialized computer-based software applications to keep records and control access to business information about time, office routines, contractor work, equipment, machinery and systems repair, and other business administration tasks; develop, organize, store, and report business information to management, owner, and others as necessary.</p> |

| | | |
|---|-----------------------------|---|
|  | <p>Contract management</p> | <p>Identify the need for contractor services; solicit and maintain repositories of appropriately skilled vendors/contractors; negotiate terms and conditions of agreements/contracts and oversee their execution to maximize operational performance while reducing financial risk.</p> |
|  | <p>Financial management</p> | <p>Efficiently and effectively direct and control the use of funds and identify ways to minimize expenditures when implementing an annual budget to accomplish the organization's long-term financial goals.</p> |
|  | <p>Budgeting</p> | <p>Forecast required expenditures, calculate the best current costs, and plan annual implementation to accomplish specified objectives for the year.</p> |
|  | <p>Project management*</p> | <p>Plan, organize, and manage resources to bring about the successful completion of a specific project.</p> |

***Note:** *Not all PMs and BOs conduct full capital construction projects such as adding to an existing property, but they all manage simple construction such as tenant improvements.*

The occupation profiles were further analyzed to:

- Determine at which level to apply the competencies (duties, tasks, steps)
- Identify which competencies to apply, and
- Determine how to apply the seven attributes

It was determined that the appropriate level to apply competencies was the task level. This decision was based on:

- Duties are not performed; they are major areas of responsibility
- Tasks are what practitioners do to perform the occupation and are most easily observed

To identify what competencies to apply to a task, each one was analyzed by:

- Grouping the steps and notes listed and reframing them as behaviours by which the task could be observed and measured
- Then, considering each group of behaviours carefully to determine which competencies would be necessary to apply when performing it

Attributes

The preliminary interviews and JTAs, combined with a careful analysis of the occupation profiles, revealed seven attributes associated with the PM and BO occupations, as shown in the table below.

| The attribute | involves qualities and/or features like but not limited to ... |
|---|--|
|  <p>Accountability</p> | <ul style="list-style-type: none"> ▪ Assuming a clear sense of ownership ▪ Taking personal responsibility for decisions, actions and failures, ▪ Implementing agreed-upon decisions ▪ Following through on commitments and showing others you can be trusted to do what you say you'll do ▪ Successfully transforming efforts into results ▪ Maintaining confidentiality with sensitive information ▪ Acknowledging and learning from mistakes without blaming others |
|  <p>Change management</p> | <ul style="list-style-type: none"> ▪ Recognizing change as a regular part of business operation ▪ Identifying and implementing new ways to perform activities to realize successful outcomes of a business change ▪ Applying new practices positively, routinely, and successfully as changes occur ▪ Adapting to new ideas using a solutions-focused approach (anticipate problems, identify solutions, take appropriate action) |
|  <p>Continuous improvement</p> | <ul style="list-style-type: none"> ▪ Identifying areas where changes can be made ▪ Using technological solutions to simplify business processes, revise efficient human resources capacity, and improve effectiveness of work methods, systems and operational equipment and machinery ▪ Upgrading work methods, procedures, and systems and decreasing costs to improve the quality and efficiency of products and services ▪ Continuously looking for and leveraging new information |

| | |
|--|--|
|  <p>Resiliency</p> | <ul style="list-style-type: none"> ▪ The personal capacity to recover quickly from difficulties by engaging in self-care and adaptability ▪ Detecting when you need assistance practising self-care ▪ Seeking help with situations that are causing distress ▪ Finding ways to persevere by managing feelings and stress, and finding alternative ways to engage ▪ Being strong when faced with challenge, adversity, hardships, and change; recovering and bouncing back ▪ Taking positive action after recovering from adversity and hardship; feeling stronger and more capable to cope than before (mental toughness) ▪ Practising optimism – treating problems as learning opportunities ▪ Modelling practices that work best to remain healthy while supporting others ▪ Being active in the wider community and engaging in social support and interaction ▪ Celebrating personal successes |
|  <p>Self-awareness and confidence</p> | <ul style="list-style-type: none"> ▪ Trusting personal ability to meet situations as they arise ▪ Demonstrating a balance of self-confidence with openness to the thoughts and opinions of others ▪ Engaging in self-reflection to identify personal limitations and strengths ▪ Recognizing that personal thoughts and attitudes can influence behaviour and actions |
|  <p>Continuous learning and development</p> | <ul style="list-style-type: none"> ▪ Approaching life with curiosity ▪ Keeping an open mind and asking questions about various topics ▪ Viewing personal experiences as learning opportunities as opposed to challenges ▪ Observing others who are more experienced to discover new ways of doing things – alternative methods ▪ Engaging in self-reflection to identify assumptions, values, methods, policies, and practices ▪ Identifying areas where personal growth may be helpful, and taking advantage of opportunities to learn and develop |



Emerging technology and information systems

- Recognizing and using new and innovative technology applications to improve business operation, building management, and maintenance sustainability:
 - Computer-based information technology for efficient communications, networking, and administration tasks
 - Specialized software for building maintenance, property management, utility use monitoring, etc.
 - Mechanical technology for efficient mechanical operation and control, such as access and security, heating, ventilation and air conditioning, lighting, equipment operation, etc.
- Developing plans for continuous improvement of business operation, building management and maintenance via technology use
- Continually engaging in education and training opportunities to improve technical knowledge and skill

It was determined that the best way to apply these attributes was to include them when the time comes to assess a person's competence.

Specifically, although all seven apply to the entire occupation, all of them do not apply equally to every task. In addition, applying all seven to every task would increase the complexity of the assessment and potentially confuse the outcome of the assessment.

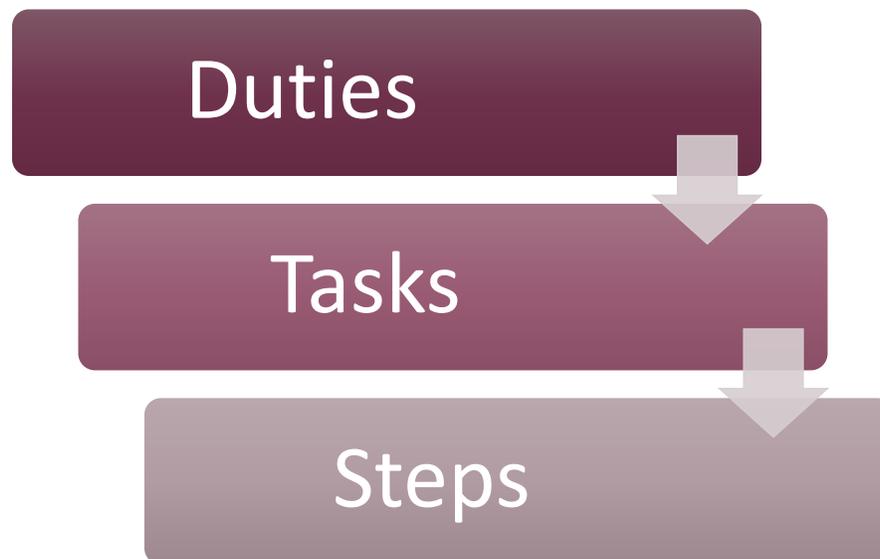
Therefore, when the time comes to assess a PM or BO's performance, the task or set of tasks to be assessed would be considered carefully to identify which attributes apply. Those attributes would be included in the design of the instrument used to conduct the assessment.

SECTION 3 – OCCUPATION PROFILES

An occupation profile is the result of analyzing an occupation in terms of the areas of responsibility, tasks performed, knowledge and skills required, and conditions in the working environment in which the occupation is performed. The analysis is conducted with a group of representatives who are knowledgeable of the occupation, have extensive experience performing it/are considered experts, and have the respect and support of their peers.

A separate [occupation profile](#), also known as a job function profile, was developed for PMs and for BOs.

Each profile provides an overall high-level, big-picture view of the occupation and comprises three parts:



- **Duties** – major areas of responsibility; as such, a duty is not one specific action but rather a collection, with tasks nested under duties and steps nested under tasks
- **Tasks** – activities that a duty comprises and which are actually performed on the job
- **Steps** – processes and/or procedures as well as notes about how a task is performed

Because duties are not activities to be completed, they are not listed in sequence, but rather in what could be considered their order of importance. However, because their composite tasks and steps are actually performed, they are listed in the order in their usual sequence.

Following is a high-level profile for each occupation, consisting of duties and tasks only.

Full profiles, including the steps for each task, are in the [Appendix](#).

Building Operator Occupation Profile

| Duty | Tasks |
|--|--|
| 1. Provide stewardship of the asset to ensure its longevity and value to the owner and users | 1.1 Develop and document preventative maintenance and long-term capital maintenance plans 1.2 Forecast repairs 1.3 Manage repairs 1.4 Respond to urgent maintenance requirements |
| 2. Ensure the safety of operations and people according to technical and occupational standards and regulations | 2.1 Perform various inspections regularly 2.2 Maintain documents 2.3 Provide safety education and notification 2.4 Participate in committees 2.5 Conduct risk assessments 2.6 Manage personal safety of various stakeholders 2.7 Maintain asset safety plans |
| 3. Work with management to ensure financial stability | 3.1 Establish maintenance, repair and replacement costs 3.2 Develop operating and capital budgets 3.3 Prioritize critical components and safety 3.4 Monitor performance against budget 3.5 Collaborate in budget reviews |
| 4. Manage expectations of management/owners, tenants and building users | 4.1 Work collaboratively to manage expectations of users 4.2 Manage tenant complaints, needs and requests for maintenance and modifications 4.3 Manage resource and budget expectations of senior executives to operate safely and efficiently |
| 5. Act as ambassador for the organization | 5.1 Conduct client relations collaboratively 5.2 Communicate effectively with other team members 5.3 Engage professionally with all stakeholders |
| 6. Maintain currency with education and standards | 6.1 Maintain knowledge of and compliance with legislation and regulations 6.2 Maintain knowledge of technology 6.3 Prioritize learning needs |

Property Manager Occupation Profile

| Duty | Tasks |
|--|---|
| 1. Manage an asset's financial condition in keeping with industry standards and owners' goals | 1.1 Prepare and maintain operating budget 1.2 Prepare and maintain capital budget 1.3 Maintain financial agreements including leases and licenses 1.4 Interpret financial statements and report on budgetary variances 1.5 Conduct cashflow forecasting and analysis 1.6 Manage transactions including receivables and payables 1.7 Manage an asset's financial condition in keeping with the owner's goals 1.8 Manage construction of a capital project |
| 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 | 2.1 Monitor the overall condition of all components of the physical asset 2.2 Oversee building operation 2.3 Manage contracts for services 2.4 Handle incidents and insurance claims 2.5 Maintain the lease obligations of all parties to the Agreement |
| 3. Manage and oversee the administration of an asset to maximize/meet the owner's goals in keeping with industry standards | 3.1 Maintain accurate property/building documentation 3.2 Manage tenant responsibilities 3.3 Manage personnel including staff and contractors |
| 4. Oversee internal and external market relations | 4.1 Conduct tenant relations and retention activities 4.2 Maintain currency with market trends 4.3 Conduct social, charitable, community programming, and business development events |
| 5. Develop sustainable practices in the operation of the property asset in keeping with local, provincial and national standards, and owner and tenant goals | 5.1 Optimize the asset's energy efficiency 5.2 Undertake waste management programs 5.3 Promote environmental responsibility with tenants and external parties |

SECTION 4 – COMPETENCY PROFILES

As accurate descriptions of occupations within an industry, competency profiles act as a standard for several purposes: employment, learning and development, and performance assessment.

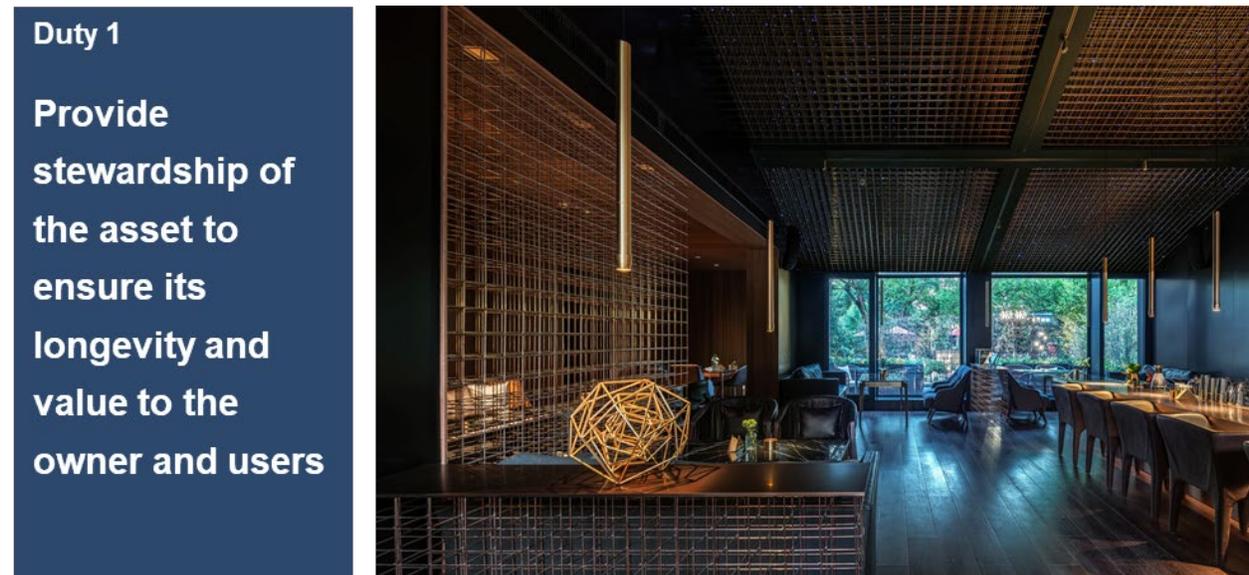
At first glance, the competency profiles may seem to replicate much of what is in the occupation profiles; however, their focus is somewhat different in that they specify the competencies necessary to conduct duties, tasks, and steps/elements of an occupation and, more importantly, the behaviours that provide evidence of successful performance. Determining whether an individual is competent requires proof or evidence. Observed behaviour is how evidence is obtained and measured.

Building Operator

This profile represents the competencies a BO is expected to demonstrate to perform each task listed for each duty in the occupation.

The duties are listed followed by each task the duty comprises. Then those competencies of the 13 identified for BOs and PMs that apply to the task are listed, along with the behaviours by which the competency can be observed.

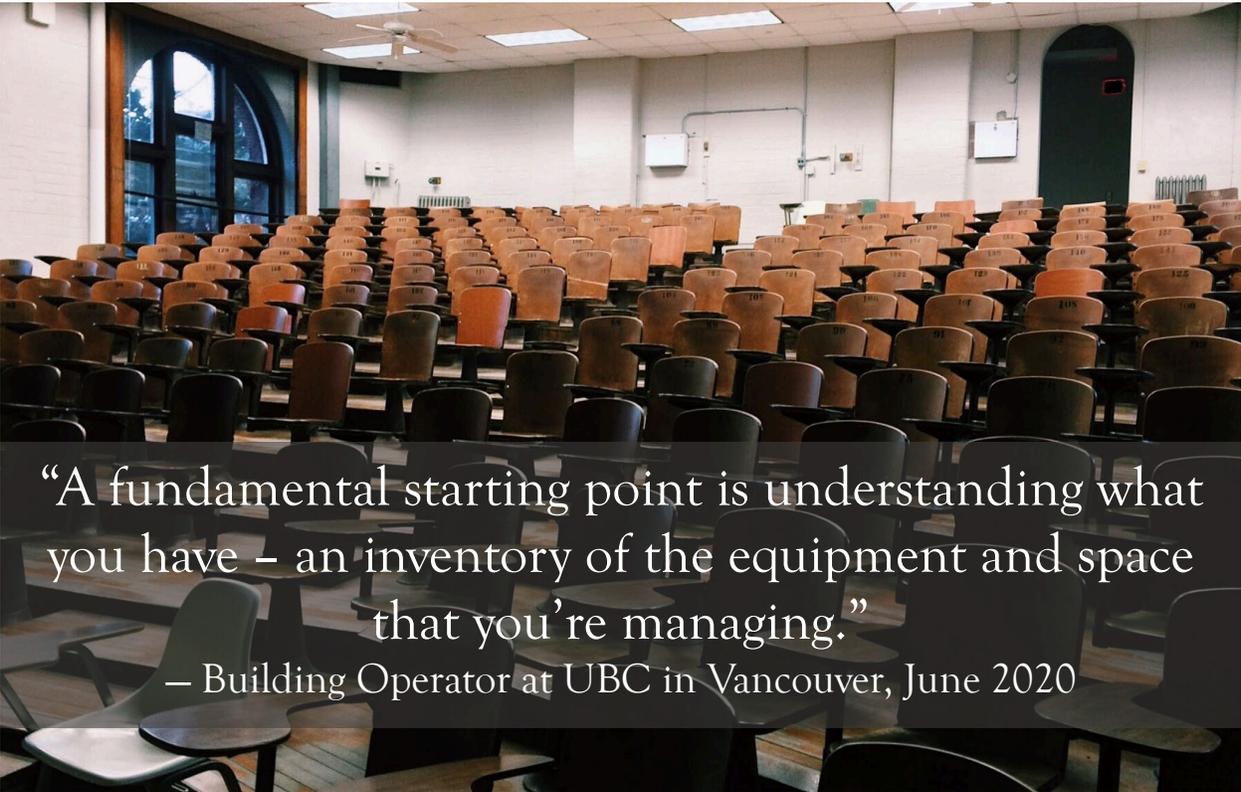
The competencies are not listed in a particular order. Rather, they are listed in the order in which they are likely performed.



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

| Competency | Behaviours |
|---|--|
|  Organization and time management | <ul style="list-style-type: none">▪ Identify actions and situations that could distract from work from being done▪ Identify short-term and long-term maintenance requirements and capital improvements▪ Determine lead time needed to prepare for work▪ Schedule activities (repair, replace, upgrade) well in advance of when work is needed |

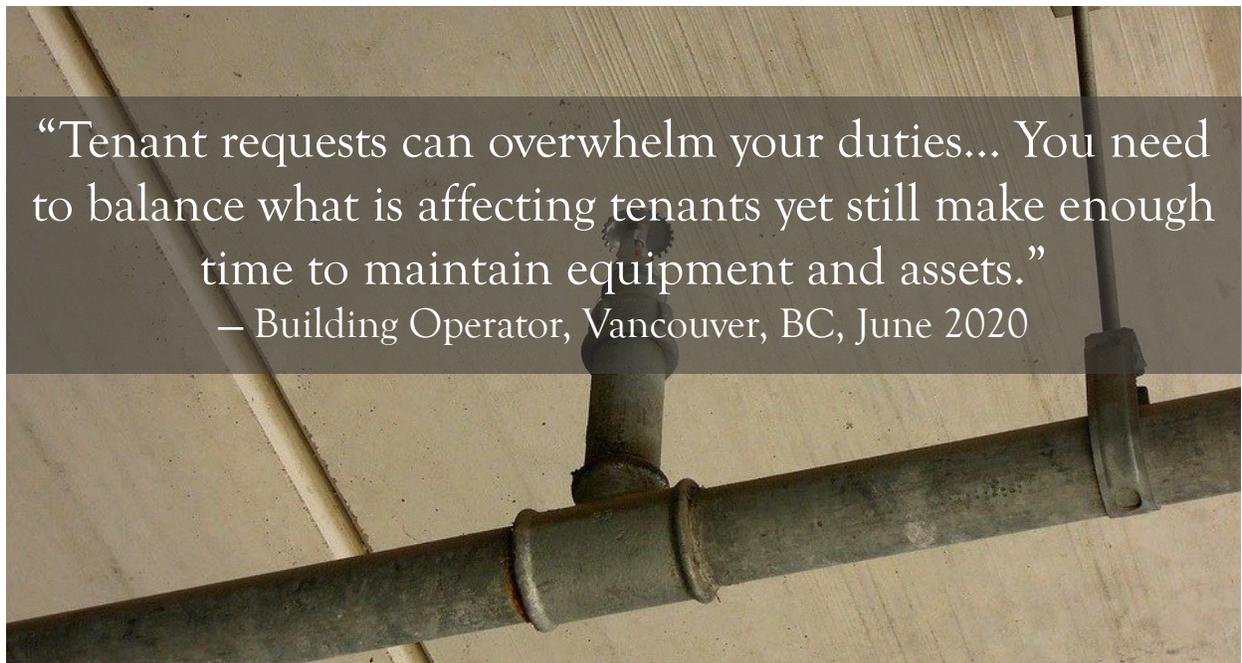
| Competency | Behaviours |
|---|---|
|  <p data-bbox="347 268 532 331">Planning and prioritization</p> | <ul style="list-style-type: none"> <li data-bbox="630 268 1386 331">▪ Exhibit a high level of energy and commitment and be able to manage multiple tasks simultaneously <li data-bbox="630 344 1414 407">▪ Identify short- and long-term goals to be achieved, and required deadlines <li data-bbox="630 420 1398 483">▪ Prioritize work to deliver successful results within agreed-upon timeframes <li data-bbox="630 495 1243 527">▪ Use available resources with maximum efficiency <li data-bbox="630 539 1419 602">▪ Develop plans for continuous improvement of building operation and maintenance <li data-bbox="630 615 1406 678">▪ Conduct a thorough inventory of the asset's on-site equipment, machinery, and systems <li data-bbox="630 690 1084 722">▪ Identify maintenance tasks for each <li data-bbox="630 735 1076 766">▪ Classify tasks as urgent vs. routine |
|  <p data-bbox="347 804 532 867">Document management</p> | <ul style="list-style-type: none"> <li data-bbox="630 804 995 835">▪ Develop plans for new work <li data-bbox="630 848 1040 879">▪ Develop plans for ongoing work <li data-bbox="630 892 1401 924">▪ Update plans in response to situations that interrupt schedules |



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 |
|---|---|
|  Interpersonal relations | <ul style="list-style-type: none"> ▪ Obtain input from members of security, janitorial, Property Manager/Owner, etc. ▪ Provide information to others in a timely and considerate fashion ▪ Conduct all interactions in a cordial manner that indicates respect for others ▪ Develop rapport with team members, tenants, and stakeholders in such a way that they feel welcome to provide feedback and information |
|  Decision making | <ul style="list-style-type: none"> ▪ Anticipate equipment, system and machine longevity ▪ Continually evaluate equipment, systems, and parts ▪ Estimate costs of repair, replacement, and upgrades |
|  Planning and prioritization | <ul style="list-style-type: none"> ▪ Maintain knowledge of parts/equipment sources and availability ▪ Maintain knowledge of contractors, including the repairs they provide and their rates ▪ Take a high-level look at overall issues to plan and organize work to minimize expenditures |



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

| Competency | Behaviours |
|---|---|
|  <p data-bbox="347 268 537 331">Interpersonal relations</p> | <ul style="list-style-type: none"> <li data-bbox="630 268 1398 583"> ▪ Advise authorities as necessary: <ul style="list-style-type: none"> <li data-bbox="724 317 1321 380"> > Bring to Property Manager/Owner’s attention if necessary <li data-bbox="724 394 1024 426"> > Escalate if necessary <li data-bbox="724 443 886 474"> > Follow up <li data-bbox="724 491 1398 583"> > Notify insurance company when certain work is being performed or systems will be down (e.g., hot flame work, fire systems) <li data-bbox="630 598 1370 661"> ▪ Manage expectations for repairs (timeline, costs, and other considerations) <li data-bbox="630 676 1378 739"> ▪ Interact with others in a way that is respectful and facilitates information sharing |
|  <p data-bbox="347 768 532 831">Document management</p> | <ul style="list-style-type: none"> <li data-bbox="683 753 1057 785"> ▪ Document repair work done <li data-bbox="683 793 1403 863"> ▪ Maintain a history of equipment, machinery, and systems repair <li data-bbox="683 873 1273 905"> ▪ Maintain a repository of contractor information <li data-bbox="683 913 1398 982"> ▪ Determine that contractors have correct permits/licences and document accordingly <li data-bbox="683 993 1325 1024"> ▪ Keep records of communications related to repairs <li data-bbox="683 1033 1403 1138"> ▪ Provide documents to Accounting and other departments or parties per their requirements on a routine or as-needed basis |



“You need a good understanding of systems and how they react.” – Building Operator, Kamloops, BC, June 2020

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 |
|---|---|------------|
|  Decision making | <ul style="list-style-type: none"> ▪ Assess urgency and associated risk ▪ Obtain approval from Property Manager/Owner to complete work ▪ Identify appropriate resources needed to complete work ▪ Determine that contractors have correct permits/licences and document accordingly | |
|  Critical thinking | <ul style="list-style-type: none"> ▪ Analyze the situation to determine the required response ▪ Identify the most efficient solution | |
|  Collaboration and teamwork | <ul style="list-style-type: none"> ▪ Organize work ▪ Communicate the work being done and its impact on tenants/stakeholders ▪ Assign tasks to appropriate workers ▪ Oversee work ▪ Coordinate work being done by multiple contractors or team members | |
|  Document management | <ul style="list-style-type: none"> ▪ Document the event ▪ Provide documentation to Accounting or other parties per their requirements | |

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

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

Task 2.2 Maintain documents

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



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

Task 2.3 Provide safety education and notification

| Competency | | Behaviours |
|---|--------------------------------|--|
|  | Education and training | <ul style="list-style-type: none"> ▪ Inform everyone around you regarding safety: <ul style="list-style-type: none"> > Post signage > Conduct fire safety drills > Conduct one-on-one conversations with tenants, staff, and contractors ▪ Proactively seek out training that is relevant to safety ▪ Recommend relevant training to tenants, staff, and contractors |
|  | Interpersonal relations | <ul style="list-style-type: none"> ▪ Participate in planning teams ▪ Exchange information with contractors regarding standards and regulations ▪ Advise tenants when training or drills will have an impact on them |

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

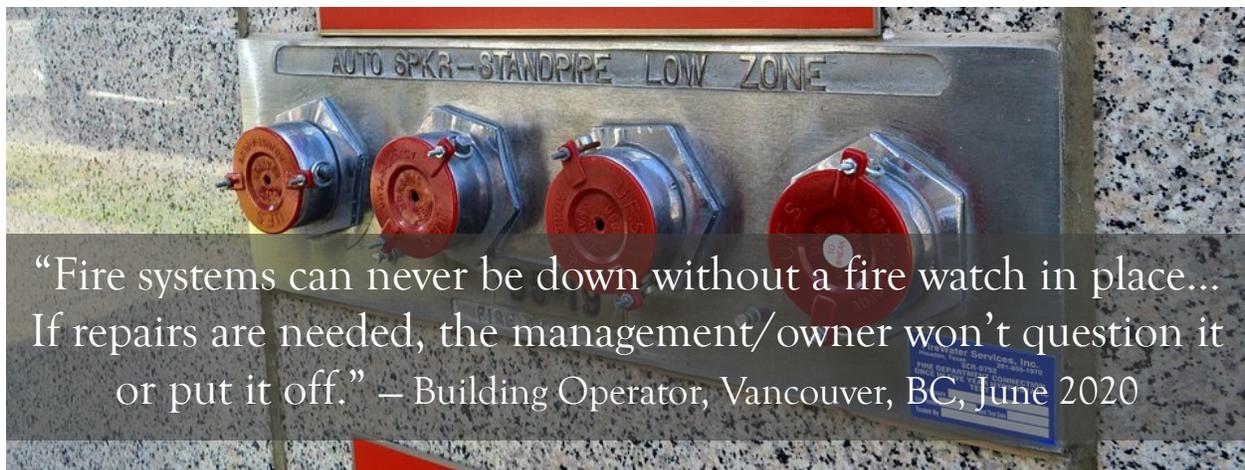
Task 2.4 Participate in committees

| Competency | | Behaviours |
|---|------------------------------------|---|
|  | Decision making | <ul style="list-style-type: none"> ▪ Determine the need for committees if you are a leader ▪ Determine information and the correct level of detail to share at committees |
|  | Planning and prioritization | <ul style="list-style-type: none"> ▪ Identify resources required to maintain committees ▪ Establish committees |
|  | Interpersonal relations | <ul style="list-style-type: none"> > Participate in committees: > Represent workers if you are a leader > Contribute input and feedback > Share information |
|  | Communications | <ul style="list-style-type: none"> ▪ Use computer-based technology to develop and circulate agendas for committees if you are a leader ▪ Receive minutes and provide feedback |

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

Task 2.5 Conduct risk assessments

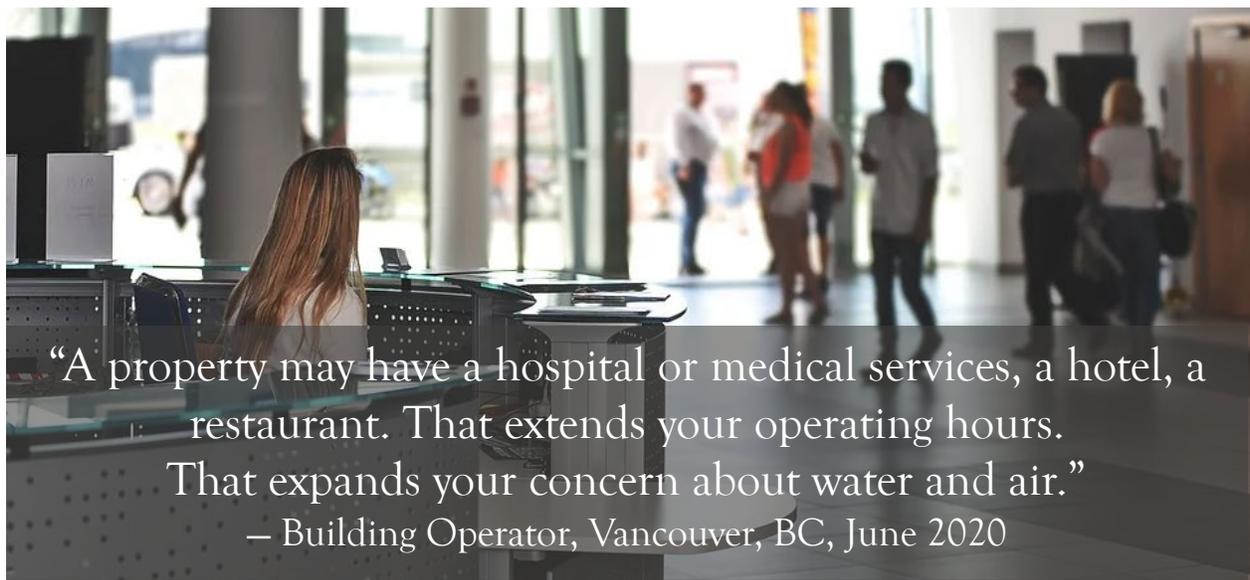
| Competency | Behaviours |
|--|---|
|  <p>Decision making</p> | <ul style="list-style-type: none"> ▪ Identify operations and activities that present or have the potential for risk ▪ Determine requirements: <ul style="list-style-type: none"> > Legal > Company > Other ▪ Determine which assessments can be conducted in-house vs. contracted out |
|  <p>Planning and prioritization</p> | <ul style="list-style-type: none"> ▪ Prepare a plan for assessing each risk and inspection activity according to existing work conditions and time availability ▪ Plan education events according to the availability of the participants to yield maximum attendance ▪ Prepare a schedule for conducting assessments and inspections |
|  <p>Organization and time management</p> | <ul style="list-style-type: none"> ▪ Conduct assessments according to the schedule ▪ Manage the implementation of assessments and inspections to yield the best allocation of workers' time |



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



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 |
|--|---|
|  Critical thinking | <ul style="list-style-type: none">▪ Create and review safety and emergency plans according to type of building, its age, and other factors▪ Stay current on regulations▪ Be aware of insurance requirements |
|  Communications | <ul style="list-style-type: none">▪ Notify insurance company when certain work is being performed or systems will be down (e.g., hot flame work, fire systems)▪ Notify tenants when work will impact them or there is a safety concern▪ Communicate safety plans to employees if you are a leader |
|  Document management | <ul style="list-style-type: none">▪ Use information technology to update safety plans and report to Property Manager/Owner |



“If a contractor’s WCB papers are not up to date, they’ll be red-flagged.” – Building Operator, Vancouver, June 2020

Duty 3

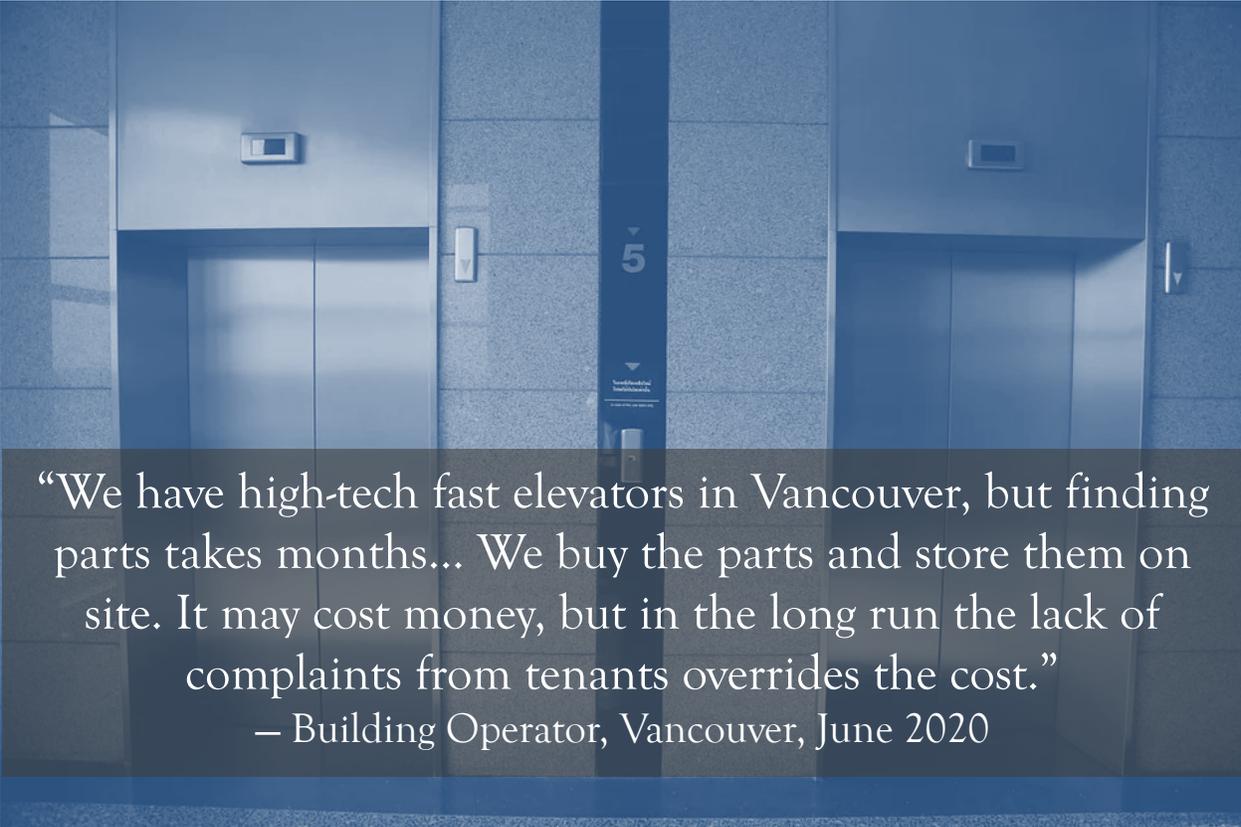
Work with management to ensure financial stability



Task 3.1 Establish maintenance, repair and replacement costs

| Competency | Behaviours |
|---|--|
|  Decision making | <ul style="list-style-type: none">▪ Determine lead time needed to do repairs or get replacement equipment▪ Determine what spare parts need stocking and whether there is adequate storage for them▪ Assess contractor rates and whether they are fair▪ Read leases to determine whether repairs/modifications can be done and what tenants can reasonably request |
|  Organization and time management | <ul style="list-style-type: none">▪ Review equipment and system inspection results to identify:<ul style="list-style-type: none">> Data> Trends> Scheduled maintenance▪ Review insurance requirements▪ Cost out/get quotes for repairs, replacement equipment, and spare parts |
|  Planning and prioritization | <ul style="list-style-type: none">▪ Track age of equipment and determine how soon and at what intervals it will need to be repaired or replaced▪ Prepare cost statement for repair, maintenance, and replacement |
|  Education and training | <ul style="list-style-type: none">▪ Take training related to sustainability▪ Take training related to efficiency▪ Read industry publications and attend industry events |

| Competency | Behaviours |
|--|---|
|  <p data-bbox="347 268 597 331">Collaboration and teamwork</p> | <ul style="list-style-type: none"> <li data-bbox="630 268 1399 331">▪ Participate in budget meetings with Property Manager/Owner and stakeholders <li data-bbox="630 344 1351 407">▪ Provide input as to equipment age, longevity, and time to repair |



Duty 3: Work with management to ensure financial stability

Task 3.2 Develop operating and capital budgets

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

Duty 3: Work with management to ensure financial stability

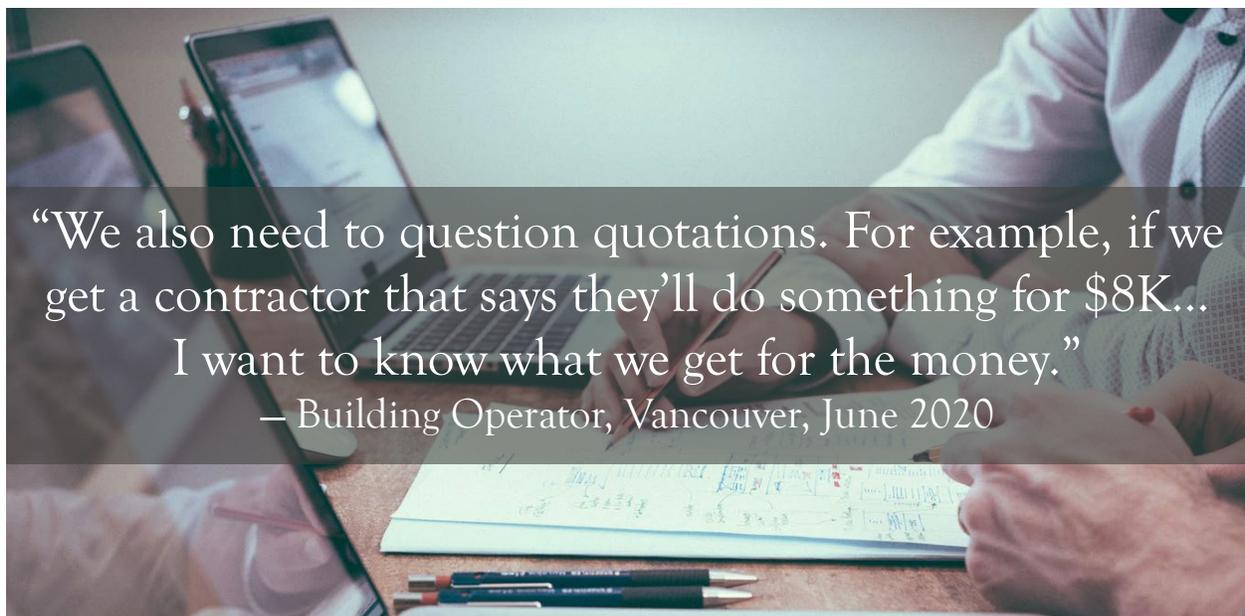
Task 3.3 Prioritize critical components and safety

| Competency | Behaviours |
|--|---|
|  Decision making | <ul style="list-style-type: none"> ▪ Examine budget components ▪ Separate operational and capital components |
|  Planning and prioritization | <ul style="list-style-type: none"> ▪ Determine the order of conducting maintenance: <ul style="list-style-type: none"> > Think holistically > Identify critical components > Consider safety ▪ Prioritize the order of conducting maintenance: <ul style="list-style-type: none"> > Determine what must be done right away vs. later > Avoid having too many repairs or replacements to do at once > Set fire safety as top priority > Organize tasks by in-house or contracted out |
|  Project management | <ul style="list-style-type: none"> ▪ Prepare a project plan for capital components: <ul style="list-style-type: none"> > Consider how one job affects another > Coordinate timing > Notify tenants of impacts |
|  Document management | <ul style="list-style-type: none"> ▪ Complete documents/paperwork (e.g., fire extinguishers, sprinkler system, flow switches work when system restarts, etc.) ▪ Read leases to understand tenants' responsibilities |

Duty 3: Work with management to ensure financial stability

Task 3.4 Monitor performance against budget

| Competency | Behaviours |
|---|---|
|  Decision making | <ul style="list-style-type: none">▪ Track equipment performance over time to determine trends▪ Identify areas for savings (lights, green equipment, pieces of equipment working against each other, etc.) |
|  Contract management | <ul style="list-style-type: none">▪ Measure actual contractor costs against estimates<ul style="list-style-type: none">> Compare contractor quotes to assess whether they are fair> Assess contractor work for quality against expense |
|  Organization and time management | <ul style="list-style-type: none">▪ Ensure tasks are performed▪ Notify insurer▪ Communicate opportunities for efficiency/sustainability to Property Manager/Owner |
|  Document management | <ul style="list-style-type: none">▪ Submit report to Property Manager/Owner |



Duty 3: Work with management to ensure financial stability

Task 3.5 Collaborate in budget reviews

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



Duty 4

Manage expectations of management/owner, tenants and building users



Task 4.1 Work collaboratively to manage expectations of users

| Competency | Behaviours |
|---|--|
|  Planning and prioritization | <ul style="list-style-type: none">▪ Identify lease requirements, stipulations, and exceptions to rules▪ Identify equipment, machinery, and system requirements▪ Determine what's possible within the budget▪ Identify tenants' business hours and coordinate work or activities to minimize impact▪ If managing multiple tasks resulting in delays, notify tenants of impacts |
|  Education and training | <ul style="list-style-type: none">▪ Stay current on industry regulations that may necessitate maintenance and impact tenants▪ Educate various parties (Property Manager/Owner, tenants):<ul style="list-style-type: none">> What's expected of equipment, machinery, and systems> How equipment, machinery, and systems function> Lease requirements, stipulations, and exceptions |

| Competency | Behaviours |
|---|--|
|  Communications | <ul style="list-style-type: none"> ▪ Create and deliver maintenance notices ▪ Proactively communicate with tenants (in person, in writing, or electronically) to ensure you are aware of their expectations ▪ Communicate with Property Manager/Owner |

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

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



Duty 5

Act as ambassador for the organization



Task 5.1 Conduct client relations collaboratively

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



“Every tenant is going to ask for something that you know isn’t part of the lease.”

– Building Operator,
Kamloops, BC, June 2020

Duty 5: Act as ambassador for the organization

Task 5.2 Communicate effectively with other team members

| Competency | Behaviours |
|---|---|
|  Collaboration and teamwork | <ul style="list-style-type: none">▪ Conduct rounds or face-to-face visits throughout the building▪ Share information▪ Obtain news or feedback from staff and contractors▪ Seek client feedback routinely:<ul style="list-style-type: none">> In person> Phone> Survey> Other▪ Follow |
|  Interpersonal relations | <ul style="list-style-type: none">▪ Build good relationships |
|  Communications | <ul style="list-style-type: none">▪ Use computer-based technology to solicit feedback informally or formally▪ Provide information to employees and staff |



“Everyone has a voice
and we have mechanisms
to raise concerns.”

– Building Operator,
Vancouver, BC, June 2020

Duty 5: Act as ambassador for the organization

Task 5.3 Engage professionally with all stakeholders

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

Duty 6

Maintain currency with education and standards



Task 6.1 Maintain knowledge of and compliance with legislation and regulations

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

Duty 6: Maintain currency with education and standards

Task 6.2 Maintain knowledge of technology

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

Duty 6: Maintain currency with education and standards

Task 6.3 Prioritize learning needs

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

Property Manager

This profile represents the competencies a PM is expected to demonstrate to perform each task listed for each duty in the occupation.

The duties are listed followed by each task the duty comprises. Then those competencies of the 13 identified for BOs and PMs that apply to the task are listed, along with the behaviours by which the competency can be observed.

The competencies are not listed in a particular order. Rather, they are listed in the order in which they are likely performed.

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 |
|--|---|
|  Budgeting | <ul style="list-style-type: none">▪ Identify budget items that make up costs:<ul style="list-style-type: none">> Contracts> Leases (to identify tenants' portion of operating costs)> Other▪ Identify budget items that make up revenue▪ Prepare annual operating budget |
|  Organization and time management | <ul style="list-style-type: none">▪ Conduct risk assessments and appraisals▪ Protect (maintain or improve) net operating income year over year▪ Ensure budget allocations are spread throughout the year |
|  Financial management | <ul style="list-style-type: none">▪ Manage immediate operating costs▪ Monitor revenue and expenditures▪ Maintain budget documents in keeping with requirements of Accounting or other departments |
|  Interpersonal relations | <ul style="list-style-type: none">▪ Approach tenants to contribute to operating costs based on leases▪ Discuss budget information with building management personnel and owner |
|  Document management | <ul style="list-style-type: none">▪ Follow privacy and confidentiality requirements for document storage▪ Report progress to owner |

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

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 |
|---|--|
|  Decision making | <ul style="list-style-type: none"> ▪ Decide how to manage agreements ▪ Determine when to outsource to leasing agents (typically vacant spaces vs. renewals) ▪ Ensure leasing agents are representing properties properly |
|  Organization and time management | <ul style="list-style-type: none"> ▪ Negotiate lease renewals ▪ Negotiate minor lease agreements (parking, storage, signage) and lease payment increases directly |
|  Financial management | <ul style="list-style-type: none"> ▪ Monitor financial agreements, leases, and licences: <ul style="list-style-type: none"> > Give feedback on agreements, make suggestions, answer questions, etc. ▪ Maintain budget documents in keeping with requirements of Accounting or other departments |
|  Communications | <ul style="list-style-type: none"> ▪ Communicate with tenants: <ul style="list-style-type: none"> > Negotiate, give feedback on agreements, make suggestions, answer questions, etc. ▪ Communicate with leasing agents ▪ Share documents with other departments and parties as needed |
|  Education and training | <ul style="list-style-type: none"> ▪ Maintain knowledge of types of leases and how they operate |
|  Document management | <ul style="list-style-type: none"> ▪ Follow privacy and confidentiality requirements for document storage ▪ Report progress to owner |

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 |
|---|--|
|  Financial management | <ul style="list-style-type: none"> ▪ Review financial statements per budget ▪ Use correct coding ▪ Identify variances ▪ Make adjustments as necessary ▪ Review property tax assessments ▪ Review insurance policies – do repair/replacement cost studies |
|  Organization and time management | <ul style="list-style-type: none"> ▪ Manage accounts receivable ▪ Manage accounts payable |
|  Interpersonal relations | <ul style="list-style-type: none"> ▪ Liaise with accountant or Accounting Department if one exists ▪ Respond to questions from landlords and owners ▪ Report property tax assessments to landlords and discuss appeals |
|  Document management | <ul style="list-style-type: none"> ▪ Follow privacy and confidentiality requirements for document storage ▪ Use computer-based technology to report adjustments to financial statements and variances to owner/landlord |



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 |
|---|-----------------------------|--|
|  | Decision making | <ul style="list-style-type: none"> ▪ Determine frequency of cashflow accounting: <ul style="list-style-type: none"> > Decide if another frequency than usual monthly period is necessary (e.g.: bi-monthly or daily due to unforeseen circumstances) |
|  | Financial management | <ul style="list-style-type: none"> ▪ Forecast the cashflow requirements for the year ▪ Analyze the existing state of cashflow to identify cautions and possibility of future changes ▪ Reassess when circumstances change |

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

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



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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 who are responsible for this, the following competencies are required.

| Competency | Behaviours |
|--|--|
|  Decision making | <ul style="list-style-type: none"> ▪ Determine who will manage construction: <ul style="list-style-type: none"> > Self-manage (plan, manage budget, implement) > Contract out (e.g.: Project Manager) |
|  Planning and prioritization | <ul style="list-style-type: none"> ▪ Scope the project: <ul style="list-style-type: none"> > If contracting out, secure Project Manager/consultants to forecast work requirements > Whether self-managing or contracting out: <ul style="list-style-type: none"> ▫ Review reports ▫ Solicit tenders ▫ Determine costs ▫ Select successful tenders |
|  Contract management | <ul style="list-style-type: none"> ▪ Create contracts ▪ Obtain sign-offs on contracts: <ul style="list-style-type: none"> > Discuss contractor requirements, schedule, invoicing, payment, etc. ▪ Administer contracts and agreements ▪ Review ongoing contracts regularly |
|  Financial management | <ul style="list-style-type: none"> ▪ Create a capital construction budget ▪ Pay invoices promptly |
|  Project management | <ul style="list-style-type: none"> ▪ If self-managing, perform project management ▪ Manage schedule and strategies to avoid delays ▪ Coordinate work to minimize inconvenience to tenants ▪ If contracting out, oversee Project Manager, contractors and subcontractors ▪ Manage schedule and strategies to avoid delays ▪ Coordinate work to minimize inconvenience to tenants |

| Competency | Behaviours |
|--|---|
|  Interpersonal relations | <ul style="list-style-type: none"> ▪ Act as liaison between tenant and owner if appropriate ▪ Speak collaboratively with construction personnel (contractor superintendents, contractors, and subcontractors) and building maintenance personnel (e.g.: Building Operator) |
|  Communication | <ul style="list-style-type: none"> ▪ Communicate project information to tenants: <ul style="list-style-type: none"> > Translate information from Project Manager, general contractor, and tradespeople into common language to ensure tenant understanding > Describe schedule and strategies to manage delays > Describe costs > Explain cost overruns if appropriate > Notify if interruptions are expected |
|  Document management | <ul style="list-style-type: none"> ▪ Maintain accurate project records ▪ Follow privacy and confidentiality requirements for document storage ▪ Report progress to owner |



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



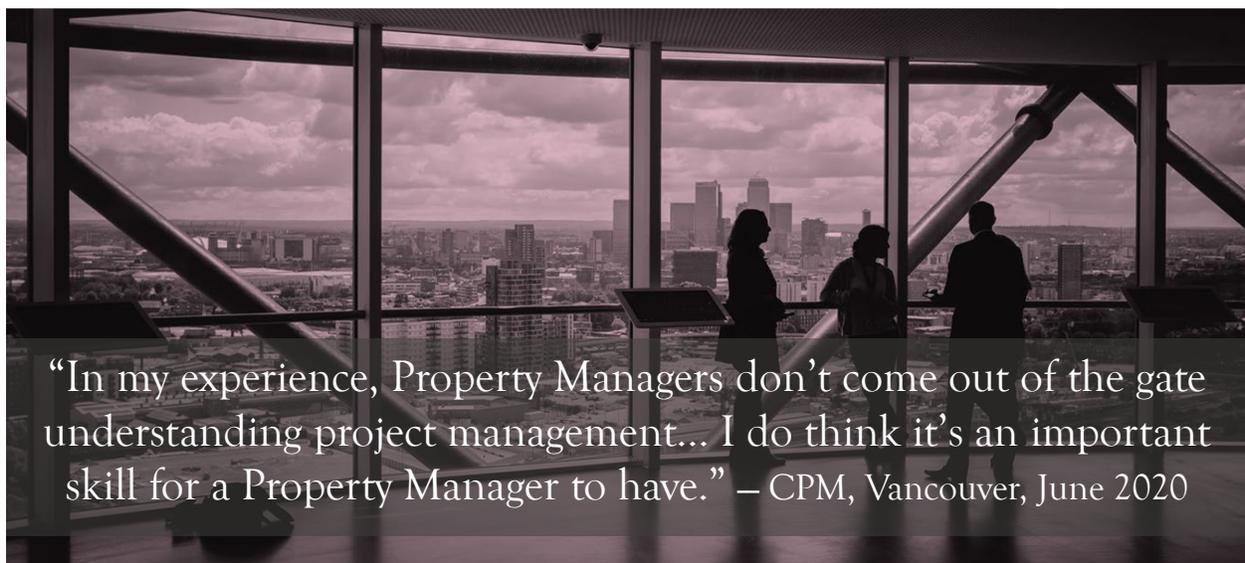
Task 2.1 Monitor the overall condition of all components of the physical asset

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

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 building operation

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



“In my experience, Property Managers don’t come out of the gate understanding project management... I do think it’s an important skill for a Property Manager to have.” – CPM, Vancouver, June 2020

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

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 |
|---|---|
|  Decision making | <ul style="list-style-type: none"> ▪ Decide who will conduct safety risk assessments: <ul style="list-style-type: none"> > Perform safety risk assessments yourself > Outsource to insurance company |
|  Organization and time management | <ul style="list-style-type: none"> ▪ Oversee safety risk assessments ▪ Administer insurance claims according to carrier protocols ▪ Schedule fire inspections ▪ Conduct inspections: <ul style="list-style-type: none"> > Trip-and-fall hazards > Blockages > Other ▪ List specific details about equipment or the physical plant |
|  Document management | <ul style="list-style-type: none"> ▪ Follow privacy and confidentiality requirements to prepare and store documents ▪ Submit to landlord/owner |



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 |
|---|--|
|  Planning and prioritization | <ul style="list-style-type: none"> ▪ Develop lease or parking agreements ▪ Ensure they contribute to owner’s financial and recovery framework |
|  Organization and time management | <ul style="list-style-type: none"> ▪ Coordinate tenant upgrades/modifications ▪ Manage lease obligations to ensure rules and regulations are being met |
|  Financial management | <ul style="list-style-type: none"> ▪ Manage rent payments ▪ Manage tenant default options for recovery, possession, etc. ▪ Invoice tenants for upgrades/modifications |
|  Document management | <ul style="list-style-type: none"> ▪ Prepare documentation ▪ Follow privacy and confidentiality requirements for document storage ▪ Report to landlord/owner |



“The development of the lease agreement... contributes to the owner’s financial framework – and also recovery framework.” – CPM, Vancouver, BC, June 2020

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 |
|--|--|
|  Decision making | <ul style="list-style-type: none">▪ Decide who will maintain documentation:<ul style="list-style-type: none">> Self> Lease administration department▪ Ensure that documentation is completed; provide final judgment as to completeness |
|  Planning and prioritization | <ul style="list-style-type: none">▪ Develop appropriate documentation:<ul style="list-style-type: none">> Standard operating procedures (SOPs)> Safety plans> Emergency plans> Environmental and specialty consultant reports> Warranties> Service contract documentation and correspondence> Lease documentation and correspondence> Other |
|  Document management | <ul style="list-style-type: none">▪ Follow privacy and confidentiality requirements for document storage▪ Report to landlord/owner |

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 |
|---|--|
|  Decision making | <ul style="list-style-type: none"> ▪ Pull credit reports to decide if potential tenants are financially viable ▪ Determine what is covered by tenant warranties |
|  Organization and time management | <ul style="list-style-type: none"> ▪ Maintain currency of tenant improvements: <ul style="list-style-type: none"> > Review building/work plans and give approval > Coordinate with construction contractors or Project Manager if necessary ▪ Confirm tenants have provided certificate of insurance ▪ Confirm tenants' insurance meets lease obligations ▪ Protect tenant warranties: <ul style="list-style-type: none"> > Conduct preventative maintenance > Conduct inspections |
|  Financial management | <ul style="list-style-type: none"> ▪ Set up direct deposit or electronic funds transfer for tenants ▪ Pay out tenant improvement allowances |
|  Interpersonal relations | <ul style="list-style-type: none"> ▪ Discuss tenant responsibilities ▪ Review: <ul style="list-style-type: none"> > Rent changes > Step-ups > Contact information |
|  Document management | <ul style="list-style-type: none"> ▪ Prepare documentation ▪ Follow privacy and confidentiality requirements for document storage ▪ Report to landlord/owner |

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 |
|---|--|
|  Decision making | <ul style="list-style-type: none"> ▪ Decide who manages staff and contractors: <ul style="list-style-type: none"> > Human Resources department, if one exists > Building Operator or BO department > Self – hire and supervise contractors and maintenance personnel ▪ Assume responsibility for performance of staff and contractors |
|  Organization and time management | <ul style="list-style-type: none"> ▪ Review occupational health and safety (OHS) regulations ▪ Manage personnel to ensure compliance with: <ul style="list-style-type: none"> > OHS regulations > WCB clearances > Insurance > Law and regulations ▪ Ensure contractors supply insurance documents, WCB clearance, etc. ▪ Complete incident reports/WCB claims for contractors and technicians |
|  Education and training | <ul style="list-style-type: none"> ▪ Ask questions to ensure everyone working in the building is up to date with legal, regulatory and best practice training ▪ Arrange for training: <ul style="list-style-type: none"> > Fast, specific needs training > Annual required training ▪ Ensure best practice training: <ul style="list-style-type: none"> > WHMIS > Hazardous materials > Other |
|  Document management | <ul style="list-style-type: none"> ▪ Prepare documentation ▪ Follow privacy and confidentiality requirements for document storage ▪ Report to landlord/owner |

Duty 4

Oversee internal and external market relations



Task 4.1 Conduct tenant relations and retention activities

| Competency | Behaviours |
|---|--|
|  Organization and time management | <ul style="list-style-type: none">▪ Identify everyone and their functions:<ul style="list-style-type: none">> Tenants> Occupants> Employees> Maintenance personnel> Janitorial service providers> Others▪ Identify tenants who are having financial problems▪ Develop a well-articulated tenant retention plan |
|  Communications | <ul style="list-style-type: none">▪ Administer promotion, signage▪ Conduct surveys |
|  Interpersonal relations | <ul style="list-style-type: none">▪ Act as liaison between tenants and owner; rephrase/soften messages if necessary▪ Conduct regular (e.g., monthly) meetings in person or via electronic meeting applications▪ Meet tenants – especially large tenants with complicated operations – proactively to discuss their intentions▪ Use positive engagement tactics to encourage tenants who may be reluctant to identify issues |

Duty 4: Oversee internal and external market relations

Task 4.2 Maintain currency with market trends

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

“Most of my Property Managers are involved with either the Chamber of Commerce or some other organization.”
 – CPM, Victoria, BC, June 2020



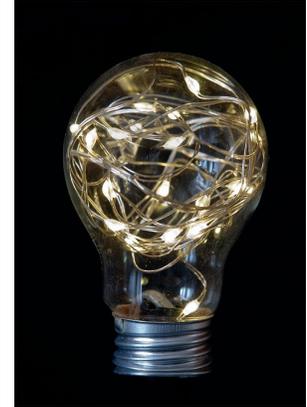
Duty 4: Oversee internal and external market relations

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

| Competency | Behaviours |
|---|---|
|  Organization and time management | <ul style="list-style-type: none">▪ Identify opportunities to give back to the community▪ Conduct business development activities▪ Make donations to other organizations |
|  Communications | <ul style="list-style-type: none">▪ Promote your property or properties |
|  Interpersonal relations | <ul style="list-style-type: none">▪ Maintain contact with Chamber of Commerce or other community organizations▪ Work with landlord/owner:<ul style="list-style-type: none">> Identify corporate social responsibility> Represent the company brand in public▪ Participate in other company-sponsored events▪ Talk to various parties about:<ul style="list-style-type: none">> What they are interested in> Their needsHow you can connect |

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 |
|---|---|
|  Organization and time management | <ul style="list-style-type: none">▪ Identify BOMA BEST resources:<ul style="list-style-type: none">> Attend webinars and events> Study website> Participate in BOMA Go Green program▪ Assess all buildings through an environmental and sustainability lens▪ Perform ongoing monitoring of properties▪ Track utility consumption, waste diversion, and air quality; determine how to manipulate and improve▪ Interpret and implement other practices:<ul style="list-style-type: none">> Green leases> Targets> Other |
|  Collaboration and teamwork | <ul style="list-style-type: none">▪ Collaborate with contractors and service providers to identify new standards or code changes |
|  Education and training | <ul style="list-style-type: none">▪ Educate tenants to make changes in utility consumption, waste diversion, and air quality |

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 |
|--|---|
|  <p>Organization and time management</p> | <ul style="list-style-type: none"> ▪ Conduct waste audits on properties ▪ Be on the alert for upcoming programs ▪ Identify impact on budget and operating expenses ▪ Study various materials to ensure their safety, such as: <ul style="list-style-type: none"> > Landscaping chemicals > Cleaning materials > Construction and/or renovation waste |
|  <p>Interpersonal relations</p> | <ul style="list-style-type: none"> ▪ Encourage tenants and owners to participate in waste management programs ▪ Maintain contact with service contractors |
|  <p>Education and training</p> | <ul style="list-style-type: none"> ▪ Educate tenants and owners on the benefits of waste management |



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 |
|--|--|
|  <p>Education and training</p> | <ul style="list-style-type: none"> ▪ Provide education activities to tenants: <ul style="list-style-type: none"> > Waste > Power/energy savings > New legislation ▪ Provide staff training on environmental standards ▪ Share information gathered: <ul style="list-style-type: none"> > Sustainability reports > Results of waste audits > Business cases for environmental improvements |
|  <p>Organization and time management</p> | <ul style="list-style-type: none"> ▪ Identify changes in standards and best practices ▪ Manage permits (e.g., Technical Safety BC) |
|  <p>Communications</p> | <ul style="list-style-type: none"> ▪ Engage in conversations with tenants early to provide owners/tenants with notice of any changes ▪ Produce and distribute information: <ul style="list-style-type: none"> > Newsletter > Website > Social media ▪ Communicate savings opportunities to tenants/owners (e.g., rebates, EV charging, etc.) |

SECTION 5 – OCCUPATIONAL STANDARDS

The focus of this project is to establish a competency-based assessment and learning framework to enable newly hired and existing practitioners to identify areas of their performance needing attention and find resources to support their learning and development. This requires establishing competency-based industry standards for the PM and BO occupations.

The foundation for such standards consists of the occupation profiles and competency profiles that have been developed for PMs and BOs.

As accurate descriptions of occupations within the Commercial Property and Facilities Management industry, occupation profiles list the duties, tasks, and steps that identify what PMs and BOs must demonstrate when performing their respective occupations.

Competency profiles are accurate descriptions of abilities that practitioners must demonstrate to indicate their ability to perform their occupations. They list the competencies and behaviours that identify how a PM or BO's performance can be observed and measured by themselves and assessors.

The attributes are another element to use when assessing a PM or BO's performance.

Together, these elements inform three types of standards for the industry:

- Industry employment
- Learning and development
- Performance assessment

Industry Employment

The competency profiles for the PM and BO occupations are the standard for existing employees to use to identify employment opportunities within the industry. Specifically, when seeking help to find opportunities to move within the industry, competency profiles can guide their identification and selection of employment options that may be available within the industry. This is important because there is no defined career path for existing employees, so competency profiles provide both them and employers with standard descriptions of what the responsibilities are and what success looks like in the roles.

Learning and Development

The occupation profiles for the PM and BO occupations are the standard for professional learning institutions to guide their development of learning opportunities that can prepare individuals who have chosen to seek employment in the industry.

They are also the official reference for employers to guide their development of learning and development opportunities that newly hired and existing employees can use to upgrade and/or maintain their existing proficiency.

Performance Assessment

The competency profiles for the PM and BO occupations are the standard for employers to guide their assessment of practitioners' performance.

To determine whether an individual is proficient and/or where gaps might exist, the individual's performance must be assessed. This is necessary for two important reasons.

1. Employers need to gather evidence by which they can monitor and measure an individual's performance to complete a number of employment activities including but not limited to:
 - Hiring
 - Probation
 - Compensation
2. Employers need to gather evidence by which they can focus/direct support for an individual's ongoing performance development.

However, determining whether an individual is competent requires proof or evidence. Evidence is the cornerstone of competence. Observed behaviour is how evidence is obtained and measured.

Evidence

As a standard for assessment purposes, a competency profile provides employers with a degree of confidence that the competencies required can be assessed equally and the outcome required is the same no matter who is being assessed or by whom.

Assessment requires gathering evidence of a practitioner's ability. But evidence must be relevant to be useful. The table below describes how evidence is relevant.

| <i>To be:</i> | <i>...evidence gathered must:</i> |
|-------------------|--|
| Valid | <ul style="list-style-type: none"> ▪ Cover all behaviours listed in the competency profile (the full range of performance). ▪ Be measured over a period of time and in different contexts. |
| Sufficient | <ul style="list-style-type: none"> ▪ Cover the elements and dimensions of competence. ▪ Include all aspects of work performance. |
| Current | <ul style="list-style-type: none"> ▪ Demonstrate competence in the current work environment (requires professional judgment). |
| Authentic | <ul style="list-style-type: none"> ▪ Be an individual's own work. Direct, indirect, and third-party evidence must all be verified as authentic. Direct evidence is the easiest type of evidence to authenticate (see note[*]). |

* There are three types of evidence that can be used to support a decision of competence:

- **Direct** – the strongest type of evidence; it is observable; it reflects an individual’s own work; it is related directly to workplace job requirements.
- **Indirect** – evidence such as projects, videos, and simulations can be as strong as direct evidence if it can be proved to be an individual’s work and maps back to the standard.
- **Third-party** – is often related to an individual’s attributes but can also include experience such as certificates, reports, reference letters, and diaries.

Type of Assessment

In a competency-based assessment and learning framework, the type of assessment used to measure performance must be *criterion-referenced*. It is important to distinguish this from norm-referenced assessment, which is used in post-secondary education and is more familiar to most people than criterion-referenced assessment.

Using criterion-referenced assessment means that after listing the tasks that a person must perform in a competency profile, the criteria used to assess whether a person can perform them must be mapped (referenced) to the competencies and their associated behaviours that define how each task can be observed and measured in the workplace.

In contradistinction to norm-referenced assessment, in which marks represent how an individual compares to the norm (middle or 50 percent), with criterion-referenced assessment there are only two possible results – the competency has:

- Been met or
- Not yet been met

In addition, not only is it important to measure whether an individual has met the criteria; it’s important to measure how closely they have met the criteria. This is done by measuring both quantitative and, if necessary, qualitative measurements.

Assessment Instruments

Instruments for assessing a non-practical task may be oral, written or a combination of both:

- Oral – competency conversation
- Written:
 - > Exam
 - > Composition
 - > Situation analysis, or
 - > Third-party documentation

For all oral and written instruments, an approved answer key is provided.

Instruments for assessing a practical task are:

- Checklist
- Rating scale, or
- Rubric.

A **checklist** is a quantitative instrument in which the required steps of a procedure, protocols of a human interaction, or features of a product are checked as they are performed. It is the most commonly used instrument for assessing performance of a practical task.

A **rating scale** is a qualitative instrument in which the required steps, protocols or features of a performance are checked as well as a subjective rating of how well they were performed against a set of opposing criteria.

A **rubric** is an alternative instrument to use when there is a need to examine a step, protocol, or feature using details that go beyond a rating scale. It is used only for tasks or parts of a task that involve specific, detailed action.

Assessment Framework

To ensure consistent measurement, regardless of who is conducting it and who is being assessed, a framework has been established to guide the implementation of performance assessment of PMs and BOs.

This framework consists of three parts.

- Criteria for assessment
- Conditions under which performance is measured
- Requirements of an assessor

Criteria for assessment

The criteria to be used for assessing an individual are the competencies and associated behaviours listed for the task(s) being assessed, as shown in the occupation's competency profile.

Conditions under which performance is measured

A practitioner must be:

- Assessed on their own (not in a group) unless the task requires group performance, and
- Given accommodation for special needs if necessary.

The assessment must be conducted in:

- The actual workplace, or
- An accurately simulated workplace.

To prove competence in a specified task, a practitioner must:

- Reveal knowledge by answering oral and/or written questions, if the task is not a practical one, or
- Demonstrate the appropriate behaviours by performing the task.

Requirements of an assessor

To be authorized to conduct an assessment, an assessor must be:

- A recognized expert (fully competent) in the occupation, and
- Able to manage time off the job to conduct assessments.

Assessors are responsible for ensuring that:

- They use only the approved instruments for assessing quantitative, and if appropriate, qualitative measurement, and
- The practitioner has access to the materials and equipment needed to perform the operational requirements of the task(s) being assessed.

SECTION 6 – OBSERVATIONS

Nomenclature

This project is focused on the management of properties in the **commercial** sector of the industry as opposed to residential, strata, or others. And because it is aimed strictly at the industry itself, when this report refers to a person responsible for management, the term **Property Manager** and the initials PM are used regardless of the size or type of commercial property or asset being managed (e.g., office buildings, retail/open-air properties, light industrial facilities and buildings, mixed-use properties). It is also important to note that, depending on the terms of employment, a PM may or may not perform all the duties and tasks specified for the occupation or perform them to the same level of completion, and hence some individuals may hold a title other than Property Manager.

Given that this report focuses on the maintenance and stewardship of commercial properties or assets regardless of size or type, the term **Building Operator** and the initials **BO** are used throughout to refer to a person responsible for commercial building operations. It is important to note that a BO may or may not perform all the duties and tasks specified for the occupation or perform them to the same level of completion, and hence some individuals may hold a title other than Building Operator.

The terms Property Manager (PM) and Building Operator (BO) should thus be understood to encompass a variety of job titles and various levels of seniority and experience.

A review of the literature and other documentation describing what is referred to as “units of competence” revealed inconsistencies as to nomenclature. After careful review and in consideration of the objective of this project, it was decided that a more generic term, “competency profile” would be used.

Because both the literature review and consultation with practitioners in the field revealed that the term “occupation” is used more commonly than “job function,” the decision was made to use this terminology in the documents prepared outlining the results of job task analyses (JTAs).

Observations

After developing the draft Occupational Standards Report, the development and communications team and BOMA BC project leaders identified some observations worth noting. Since the GAC has reviewed this report during its development, everyone involved has agreed that including these notes is appropriate. There may be implications going forward on the:

- Maintenance and updating of the deliverables (they are intended to be “living documents”)

- Agendas for future industry deliberations, especially those regarding the creation of a standard training program (should a decision to do so be made), standardization of the BO and PM occupations, and evolution of the culture of the sector.

Following are the key observations to consider:

- Written industry standards seem to be lacking and are hence difficult to articulate.
- Industry standards are highly variable from company to company and between owner-operated and third-party companies.
- Many currently available educational offerings include the residential side of real estate, which is often not relevant to commercial real estate.
- Current learning opportunities do not include some important topics for commercial property management, such as assessing annual property tax, reporting to owners, discussing appeals and insurance, and negotiation.
- There are many “grey areas” that require PMs and BOs to make judgment calls.
- Accountability structures vary depending on the size of a property management company.
- Both PMs and BOs need to be nimble, as circumstances may change in working environments that are challenging and dynamic – especially as regards technological change, “smart buildings” and environmental or sustainability initiatives.
- The shift to assessing employees based on competencies may represent a paradigm change for many employers. Especially for employers who are pressed for time, heavily involved in operations, and forced to be reactive rather than proactive, the recommendations in this report may seem onerous at first. For companies where the BO and PM roles deviate from the competency profiles provided in this report, the recommendations may seem irrelevant. This perhaps illustrates the challenge of developing standardized job titles and descriptions in an industry with so much variation. As well, rapid changes in technology are triggering BO and PM roles to evolve, with educational offerings lagging behind. This highlights the importance of developing and applying industry-wide definitions to BO and PM roles and associated competencies, so that stakeholders continue to speak the same language and present a unified and visible brand presence to the world beyond their industry. This in turn will enable companies to promote job opportunities that students and potential candidates will recognize as viable and appealing employment options.

Written industry standards are lacking. Participants in the job task analysis sessions, both BOs and especially PMs, said that experience was a critical element in becoming successful, and that practitioners rarely entered the profession having all the necessary competencies. For example, there are very few local, provincial, and national standards for sustainable practices in the operation of a property asset.

Performance requirements are highly variable from company to company and between owner-operated and third-party companies. In particular, leasing may or may not be required at a given company, although all BOs and PMs emphasized the importance of understanding leases.

Educational offerings tend to include the **residential side of real estate**, which is often not relevant to PMs and BOs (although in mixed-use applications it may have limited relevance).

Education is mixed within the industry for particular topics such as assessing annual property tax, reporting to owners, discussing appeals and insurance, and negotiation. More importantly, while employers tend to expect PMs and BOs to know a fair amount about many subjects, the industry does not sufficiently encourage them to learn them and there is no official training provided. For example, a large part of a PM's responsibility is project management, especially with capital construction projects involving project teams. However, although project management training exists, including PMP certification, there is no project management training for commercial real estate that is competency-based and industry-recognized. Similarly, although information about subjects such as property tax assessment and licensing exists from organizations such as the Appraisal Institute of Canada and the UBC Sauder School of Business, there is no official industry-provided or recommended training. PMs also pointed out that, while they do not have to know absolutely everything about equipment replacement or repair, they do need to be able to speak about it coherently and direct employees and contractors to do the work.

This report reflects a specific point in time – the current situation – but the Commercial Property and Facilities Management sector is increasingly subject to change. The COVID-19 pandemic is an example of a driver of such change – socio-economic, technological, communications, and otherwise – and has impacted not only how PMs and BOs perform their day-to-day jobs, but how this project itself has been conducted. This is reflected in the decision, after the project had already begun, to hold conversations with industry practitioners (e.g., interviews and job task analysis sessions) via Zoom electronic video-conferencing technology. At the time this report was first drafted, no specific changes had been identified to the core duties and tasks for PMs and BOs, although both groups noted that they **need to be nimble**. For example, PMs have had to adjust how they administer rent relief paperwork and manage cashflow during the pandemic. In addition, tasks like conducting building inspections, holding conversations with tenants, and conducting social events are being completed following the COVID-19 protocols recommended by the World Health Organization and/or employers.

In terms of **technological change**, discussions with practitioners revealed that BOs and PMs face the challenge of buildings continually “getting smarter,” with the application of highly sophisticated mechanical and operating systems that are significantly changing how buildings are managed and operated. Whereas in the past a BO may have been required to collect and

test water samples for pathogens (or arrange for a contractor to do so), many buildings now have software installed to test water quality, which the BO monitors using software.

Another example is a software detection system that monitors a boiler's water level and temperature and automatically shuts the unit down when it overheats or lacks water, obviating the need for a BO to examine a thermometer and water level indicator. Depending on the type and age of a property, BOs are increasingly engaged in using technology applications to perform many job-specific tasks, as opposed to completing them physically in person. Meanwhile, PMs are spending more time determining which technologies to purchase and install to manage costs.

The use of technology applies to all types of commercial properties and facilities in all regions of the province. However, currently the number and type of technologies used varies greatly depending on the size, type, class, and sophistication of the property. Nevertheless, the trend in building operation is toward technology-control.

In interviews, practitioners discussed their use of technology at a high level rather than describing specific applications or software, but all emphasized that they must keep up with rapid change and that a significant amount of computer use is involved in their day-to-day work.

There are many "grey areas" that require **BOs and PMs to make judgment calls**. For example, tenants may wish to modify their spaces, placing the onus on BOs to vet contractors and/or verify that a tenant's preferred contractor has the necessary insurance and clearances. It could be argued that the ability to make such judgment calls is developed only through experience – not through formal education or certification.

Accountability structures vary depending on the size of a property management company. Some companies may have dedicated BOs, but others do not and must bring in contractors, which increases the supervisory load on PMs, who may or may not have the operations knowledge to properly vet contractors.

APPENDIX

Governance Advisory Committee

Kick-Off Meeting Participants

BOMA BC

| Name | Role/Responsibility |
|--------------------|---|
| Damian Stathonikos | President |
| Muneesh Sharma | Director of Government Affairs and Communications |

Siena Consulting

| Name | Role/Responsibility |
|----------------|--------------------------|
| Bohdan Zajcew | Project Management |
| Gayle Farrell | Communications |
| Kerry Elfstrom | Learning and development |
| Kate Spezowka | Research |

Governance Advisory Committee

| Name | Title/Role | Organization |
|-----------------|--------------------------------------|--|
| Peter MacHardy | Chair | Property Management Institute of Canada |
| Lesley Heieis | VP, Property Management BC | Colliers International (National and BC) |
| Laura Malley | Director, Property Management BC | Triovest Realty Advisers (BC) Inc. (National and BC) |
| Dion Chrapko | VP, Property Management BC | Bentall Kennedy (Canada) LP (National and BC) |
| Lorna Park | Sr. VP, Property Management | Warrington PCI Management (BC) |
| Colin Murray | President | West Pender Property Group (Vancouver) |
| Oskar Kwieton | Director, Facilities & Operations BC | Shape Properties Management Corp. (Vancouver, Burnaby, Vancouver Island, Abbotsford) |
| Neil Eckman Sr. | Director, Property Management BC | GWL Realty Advisors (National and BC) |

| Name | Title/Role | Organization |
|-----------------------|---------------------------------|---|
| Susan Dodsworth | National Director, Operations | Brookfield Global Integrated Services (National and BC) |
| Wayne Smithies | President | Martello Property Services Inc. (National and BC) |
| Mike Bishop | VP, Asset & Property Management | Low Tide Properties Ltd. (Lower Mainland) |
| Jim Preece | President | PMI Canada |
| Taylor Gallaher | Director, Property Management | Beedie (Lower Mainland) |
| Ken Chu | VP, Property Management | TPMG Capital (Lower Mainland) |
| Elyse Norgaard Kituri | General Manager | Anthem Properties Group Ltd. (Lower Mainland) |

Key Informant Interviewees

| Name | Title/Role | Organization |
|-----------------|-------------------------------|---|
| Dawn Surette | VP, Property Management | Warrington PCI (Lower Mainland) |
| Leanne Reynolds | General Manager (PM) | Colliers (Lower Mainland) |
| Sean Stevenson | Senior Building Operator | Low Tide Properties (Lower Mainland) |
| John Metras | Associate VP, Facilities (BO) | University of British Columbia (Lower Mainland) |

Job Task Analysis Participants

Property Managers

| Name | Title/Role | Organization | Attended | Reviewed Drafts |
|-----------------|--|------------------------------------|----------|-----------------|
| Dawn Surette | VP, Property Management | Warrington PCI (Lower Mainland) | X | X |
| Leanne Reynolds | General Manager | Colliers (Lower Mainland) | | X |
| Jean McKay | President and Managing Broker | Richmond Property Group (Victoria) | X | X |
| Arya Ghodsi | Director, Commercial Property Management | Wesgroup (Lower Mainland) | X | X |

| Name | Title/Role | Organization | Attended | Reviewed Drafts |
|---------------|------------------|--------------------------------------|----------|-----------------|
| Elizabeth Han | Property Manager | SDM Realty Advisers (Lower Mainland) | X | X |
| Bob Hillhouse | President | Majestic Management (Northern BC) | | X |

Building Operators

| Name | Title/Role | Organization | Attended | Reviewed Drafts |
|----------------|--------------------------|---|----------|-----------------|
| Sean Stevenson | Senior Building Operator | Low Tide Properties (Lower Mainland) | X | X |
| John Metras | Associate VP, Facilities | University of British Columbia (Lower Mainland) | X | X |
| John Milton | Building Operator | Colliers (Lower Mainland) | X | X |
| Rick Bischler | Operations Manager | Cushman Wakefield (Interior) | X | X |
| Fito Garcia | Building Operator | Low Tide Properties (Lower Mainland) | | X |
| Don Kirlew | Operations Supervisor | Anthem Properties (Vancouver Island) | | X |
| Ron Stevenson | Operations Manager | Primaris (Interior) | | X |
| Paul Ryan | Operations Supervisor | RioCan (Northern BC) | | X |

OCCUPATION PROFILES

There are two occupation profiles in this Appendix, one each for the Building Operator and Property Manager occupations. Each profile consists of five parts:

| | |
|---|---|
| Occupation | <ul style="list-style-type: none">▪ An overview of the occupation |
| Workplace Conditions | <ul style="list-style-type: none">▪ A list of issues and/or conditions that typically prevail in the workplace for the occupation |
| Tools, Skill, and Knowledge Requirements | <ul style="list-style-type: none">▪ A list of the tools, skills, and knowledge that are considered fundamental for a person to be able to perform the occupation |
| Duties and Tasks | <ul style="list-style-type: none">▪ A list of the major areas of responsibility (duties) and activities a person performs to complete a duty (tasks) as an overall high-level, big-picture view of the occupation |
| Duties, Tasks, and Steps | <ul style="list-style-type: none">▪ The processes and/or procedures as well as important notes (tasks and steps) that describe how each task is performed |

Building Operator

Occupation

A Building Operator (BO) is one of two occupations in the Commercial Property and Facilities Management sector.

The BO occupation is a generic title. Depending on the terms of employment, a BO may or may not perform all the duties and tasks specified for the occupation or perform them to the same level of completion, and hence employees may have different titles and job descriptions.

Regardless, a BO is generally considered to be a strategic position in the Commercial Property and Facilities Management sector whose overall function is to ensure the safe, efficient, and sustainable operation, maintenance and stewardship of property assets (regardless of the asset's form, such as office buildings, retail/open-air properties, light industrial facilities and buildings, and mixed-use properties) at an optimal level, in keeping with industry standards and owners' goals.

The BO's main focus of attention is on technical and practical, as opposed to financial, aspects of operating a building or other property to ensure its safe and efficient use, ensuring that tenants and users receive high-quality, uninterrupted service in well-maintained properties. BOs are also responsible for responding to technical problems as they arise.

BOs require a high degree of technical knowledge and aim for mastery in their field.

The Commercial Property and Facilities Management sector is increasingly subject to technological change, especially with respect to computer-based and information technology. The shift toward knowledge and technology-based work means that BOs will have to engage in relevant education and training in their ongoing learning and development efforts.

Their superior leadership and technical skills, combined with an ongoing increase in demand for improved quality of service and equipment, make BOs capable providers of excellent customer service.

Note: *This occupation profile contains descriptions that accurately reflect how the occupation is performed at a particular point in time (June 2020). It is intended that this will be a "living" document that is updated regularly.*

Workplace Conditions

BOs face issues and/or conditions that prevail in the working environment that may help or hinder their ability to perform the occupation. Following is a list of issues and/or conditions that typically prevail in the workplace:

- Continuous change
- Lack of clear, consistent job descriptions
- The need be a self-starter who is self-motivated and directed

- The need to use a creative approach to problem solving and decision making
- The need to review the budget routinely
- Ability to:
 - > Perform under pressure
 - > Engage in continuous learning and development, especially regarding safety and environmental regulations and the rapid advancement of technology, with highly sophisticated mechanical and operating systems being installed in buildings
 - > Anticipate repair and maintenance and estimate costs

Conditions that **hinder** the ability of a BO to perform their occupation:

- Lack of parts available
- Range of age of assets – from legacy buildings to newly built; the existence of legacy equipment
- Need to identify, plan, and communicate the need to replace obsolete equipment
- Some standards may not be equally understood by all BOs or consistently implemented

Conditions that **help** BOs perform their occupation:

- Direct management support (feeling respected and valued)
- Constant change and variety of technology
- Personal empowerment
- Challenging and dynamic working environment

Tools, Skill, and Knowledge Requirements

Tools

The following tools are used on the job and applied commonly throughout all duties and tasks that the BO occupation comprises.

- Personal computer
- Cell phone
- Email
- Internet
- MS Office applications
- Vendor manuals
- Documentation
- Hand and mechanical tools
- Basic diagnostic tools
- Personal Protective Equipment (PPE)

Skills

The position requires the BO to have the following well-developed set of skills, which are considered fundamental to be able to perform the BO occupation.

- Analysis
- Organization
- Communication (written, verbal, non-verbal)
- Prioritization (triage)
- Decision making
- Planning
- Troubleshooting
- Interpersonal relations (public relations, customer relations, “people” skills)
- Time management
- Software application operation
- Parts repair
- Use of various tools
- Customer service (dealing with difficult people, dealing with difficult situations)

Knowledge

The position requires the BO to have the following knowledge about building operation, which is considered fundamental to be able to perform the BO occupation.

- Budget components (capital and operating elements)
- Teamwork
- Working collaboratively
- WorkSafeBC and Technical Safety BC and other regulations
- Typical conditions that prevail in the working environment
- Basic/appropriate comprehension of how to use mechanical and diagnostic tools
- Safety procedures for BOs and contractors
- Safe chemical storage
- Dangerous substances and how to handle and transport them through the building
- Mechanical and operating systems (HVAC)
- Basic electrical and plumbing

Duties and Tasks

| Duty | Tasks |
|--|--|
| 1. Provide stewardship of the asset to ensure its longevity and value to the owner and users | 1.1 Develop and document preventative maintenance and long-term capital maintenance plans 1.2 Forecast repairs 1.3 Manage repairs 1.4 Respond to urgent maintenance requirements |
| 2. Ensure the safety of operations and people according to technical and occupational standards and regulations | 2.1 Perform various inspections regularly 2.2 Maintain documents 2.3 Provide safety education and notification 2.4 Participate in committees 2.5 Conduct risk assessments 2.6 Manage personal safety of various stakeholders 2.7 Maintain asset safety plans |
| 3. Work with management to ensure financial stability | 3.1 Establish maintenance, repair and replacement costs 3.2 Develop operating and capital budgets 3.3 Prioritize critical components and safety 3.4 Monitor performance against budget 3.5 Collaborate in budget reviews |
| 4. Manage expectations of management/owner, tenants and building users | 4.1 Work collaboratively to manage expectations of users 4.2 Manage complaints, needs and requests for maintenance and modifications 4.3 Manage resource and budget expectations of senior executives to operate safely and efficiently |
| 5. Act as ambassador for the organization | 5.1 Conduct client relations collaboratively 5.2 Communicate effectively with other team members 5.3 Engage professionally with all stakeholders |
| 6. Maintain currency with education and standards | 6.1 Maintain knowledge of and compliance with legislation and regulations 6.2 Maintain knowledge of technology 6.3 Prioritize learning needs |

Duties, Tasks, and Steps

Following is a depiction of the tasks and steps and associated elements of each duty that a BO is expected to perform. An attempt has been made to list the steps in the order in which they are performed. However, personal style, experience level and employer differences will determine the actual sequence. For the purposes of this document, the order listed could be considered a logical order.

| Duty 1: Provide stewardship of the asset to ensure its longevity and value to the owner and users | |
|---|--|
| Task | Steps |
| 1.1 Develop and document preventative maintenance and long-term capital maintenance plans | <ul style="list-style-type: none"> ▪ Conduct a thorough inventory of the asset's on-site equipment, machinery and systems ▪ Identify how the equipment and systems you operate in the asset function or are designed to function: <ul style="list-style-type: none"> > How components integrate and function together, including operational sequence > Equipment and system lifespan > Identify maintenance requirements: > Fire safety measures > Equipment/system issues > Tenant issues (balance the need to assist tenants with the need to manage the building) > Repairs ▪ Determine the lead time needed for: <ul style="list-style-type: none"> > Equipment repairs or replacement or parts > System replacement > Document the plans: > Gather appropriate data > Develop and/or update plans |

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

| Task | Steps |
|----------------------|---|
| 1.2 Forecast repairs | <ul style="list-style-type: none"> ▪ Obtain input from members of security, janitorial, management/owners, etc. ▪ Anticipate equipment, system and machine longevity: <ul style="list-style-type: none"> > Identify what equipment and machines may break > Identify what systems may fail ▪ Estimate the cost for: <ul style="list-style-type: none"> > Equipment and machine repairs and replacements > System replacement or update ▪ Maintain an inventory of spare/consumable/often replaced parts on hand for future repairs |
| 1.3 Manage repairs | <ul style="list-style-type: none"> ▪ Prioritize: <ul style="list-style-type: none"> > Fire safety measures > Equipment/system issues > Tenant issues (balance the need to assist tenants with the need to manage the building) > Repairs ▪ Create an equipment, machinery and systems repair plan ▪ Determine if you can perform repairs or need to contract out the work: <ul style="list-style-type: none"> > To contract out: <ul style="list-style-type: none"> ▫ Explain system issues accurately ▫ Solicit and select contractors who have required certification and insurance ▫ Obtain quotes ▫ Ensure contractors are assessing or quoting correctly ▪ When contracting out: <ul style="list-style-type: none"> > Obtain approvals to implement scheduled maintenance > Schedule work and organize by maintenance plan |

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

| Task | Steps |
|---|--|
| | <ul style="list-style-type: none"> > Communicate schedule with various parties > Maintain good rapport with contractors, team members and stakeholders > Verify completion of work and report to management/owner ▪ Advise authorities as necessary: <ul style="list-style-type: none"> > Bring to management/owner's attention if necessary > Escalate if necessary > Follow up > Notify insurance company when certain work is being performed or systems will be down (e.g., hot flame work, fire systems) ▪ Maintain a repair history of equipment, machinery and systems |
| <p>1.4 Respond to urgent maintenance requirements</p> | <ul style="list-style-type: none"> ▪ Identify requirements and assess urgency and associated risk ▪ Liaise with management/owner to obtain approval to proceed with maintenance work ▪ Liaise with relevant parties and contractors and organize work ▪ Complete work and document |

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

| Task | Steps |
|--|--|
| <p>2.1 Perform various inspections regularly</p> | <ul style="list-style-type: none"> ▪ Conduct routine inspections of the entire asset's equipment, machinery and systems ▪ Perform inspections on a daily or weekly basis: <ul style="list-style-type: none"> > Rounds sheets > Audits |

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

| Task | Steps |
|---|--|
| | <ul style="list-style-type: none"> > Other <ul style="list-style-type: none"> ▪ Talk with tenants to identify maintenance concerns or issues ▪ Make notes during physical inspections: <ul style="list-style-type: none"> > Potential hazards > Clear paths/walkways/fire exits > Sprinkler heads not covered > Maintenance issues > Tenant concerns > Other |
| 2.2 Maintain documents | <ul style="list-style-type: none"> ▪ Create Standard Operating Procedures (SOPs) and sign sheets for mechanical rooms ▪ Create a job aid/guide/SOP for regularly used equipment and rooms ▪ Check annual operating permits ▪ Check insurance documentation with contractors ▪ Complete WCB documentation as needed ▪ Check that Technical Safety BC annual operating permits are up to date |
| 2.3 Provide safety education and notification | <ul style="list-style-type: none"> ▪ Inform everyone around you regarding safety: <ul style="list-style-type: none"> > Post signage > Conduct fire safety drills > Participate in planning teams (e.g., Covid-19 planning) ▪ Stay up to date on annual training |
| 2.4 Participate in committees | <ul style="list-style-type: none"> ▪ Determine committees in which you participate and lead ▪ Participate in committees: <ul style="list-style-type: none"> > Depending on how many staff/operators, there are usually one or two on the committee > If a committee leader (e.g.: Chair or Co-Chair), represent the workers |

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

| Task | Steps |
|--|---|
| | <ul style="list-style-type: none"> > Contribute input and feedback > Share information ▪ Receive minutes and provide feedback |
| 2.5 Conduct risk assessments | <ul style="list-style-type: none"> ▪ Determine requirements: <ul style="list-style-type: none"> > Legal > Company > Other ▪ Conduct assessments: in-house or contracted |
| 2.6 Manage personal safety of various stakeholders | <ul style="list-style-type: none"> ▪ Follow safe work protocols (e.g., Work Alone program) for staff: <ul style="list-style-type: none"> > Communicate with team > Use location tracking if available > Log in and out of work areas ▪ Follow company policies: <ul style="list-style-type: none"> > Review existing policies (e.g.: confined space) > Update requirements annually ▪ Use preferred vendor list of approved contractors: <ul style="list-style-type: none"> > Ensure contractors have documentation/insurance ▪ Check that tenants are using insured contractors if they are doing the contracting ▪ Update management with safety requirements regularly |
| 2.7 Maintain asset safety plans | <ul style="list-style-type: none"> ▪ Review safety plans: <ul style="list-style-type: none"> > Details may vary depending on type of building, its age and other factors ▪ Stay current on regulations ▪ Be aware of insurance requirements ▪ Notify insurance company when certain work is being performed or systems will be down (e.g., hot flame work, fire systems) ▪ Update safety plans and report to management/owner |

Duty 3: Work with management to ensure financial stability

| Task | Steps |
|--|---|
| <p>3.1 Establish maintenance, repair and replacement costs</p> | <ul style="list-style-type: none"> ▪ Review inspection results (<i>see Task 2.1 and Task 2.2</i>) to identify: <ul style="list-style-type: none"> > Data > Trends > Scheduled maintenance (e.g., certain repairs may need to be done every Jan/Feb) ▪ Review insurance requirements ▪ Estimate what will need repair or replacement proactively: <ul style="list-style-type: none"> > Think ahead about lead time needed to do repairs or get replacement equipment and parts > Consider stocking spare parts > Take training related to sustainability and efficiency ▪ Get quotes for repairs or replacements |
| <p>3.2 Develop operating and capital budgets</p> | <ul style="list-style-type: none"> ▪ Review the long-term goals for the asset ▪ Identify the life cycle of the asset (building, retail/open air property, light industrial facility and buildings, mixed-use property) and major component systems: <ul style="list-style-type: none"> > Age > Type > Rating > Other ▪ Review the inventory of the asset's equipment, machinery and systems and their associated service lifecycles and required maintenance schedules (<i>see Task 1.1</i>) ▪ Review inspection results (<i>see Task 2.1</i>): <ul style="list-style-type: none"> > Assess their condition > Compare to warranty terms and expiration dates > Make recommendations based on observations for improvement opportunities |

Duty 3: Work with management to ensure financial stability

| Task | Steps |
|--|--|
| | <ul style="list-style-type: none"> ▪ Make improvement recommendations based on observations |
| <p>3.3 Prioritize critical components and safety</p> | <ul style="list-style-type: none"> ▪ Examine budget components ▪ Determine the order of conducting maintenance: <ul style="list-style-type: none"> > Think holistically > Identify critical components > Organize the components with fire safety as priority ▪ Complete document/paperwork (e.g.: fire extinguishers, sprinkler system, flow switches work when system restarts, etc.) ▪ Apply project management: <ul style="list-style-type: none"> > Look at how one job affects another > Coordinate timing/sequence of tasks |
| <p>3.4 Monitor performance against budget</p> | <ul style="list-style-type: none"> ▪ Ensure tasks are performed (in-house or contractor) ▪ Notify insurer of budget deviance if necessary ▪ Measure actual costs against estimates: <ul style="list-style-type: none"> > Compare contractor quotes to assess whether they are fair > Assess contractor work for quality against expense ▪ Identify areas for savings (lights, green equipment, pieces of equipment working against each other, etc.) ▪ Track expenses and report to management/owner |
| <p>3.5 Collaborate in budget reviews</p> | <ul style="list-style-type: none"> ▪ Identify how a budget works ▪ Maintain a big-picture outlook to task jobs together to minimize expenditures over the year ▪ Review costs and expenses ▪ Report concerns ▪ Encourage gradual spending throughout the fiscal year instead of saving up and needing to spend the budget all at once Express concerns about budget with management/owner if necessary ▪ Encourage gradual spending throughout the fiscal year instead of saving up and needing to spend the budget all at once |

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

| Task | Steps |
|---|--|
| <p>4.1 Work collaboratively to manage expectations of users</p> | <ul style="list-style-type: none"> ▪ Identify lease requirements, stipulations and exceptions to rules ▪ Educate people about what's expected of the equipment, machinery, system and how it works ▪ Be aware of budget and what's possible within it ▪ Send out maintenance notices ▪ Communicate with management/owners: <ul style="list-style-type: none"> > Make them aware of your qualifications, abilities, limitations > Report or escalate issues if needed |
| <p>4.2 Manage tenant complaints, needs and requests for maintenance and modifications</p> | <ul style="list-style-type: none"> ▪ Maintain contact with leaders: <ul style="list-style-type: none"> > Participate in conversations with management/owners and owners about tenant improvements ▪ Maintain contact with tenants: <ul style="list-style-type: none"> > Provide information so they understand why equipment, machinery or systems may be down > Be polite and use a positive tone and style when speaking > Specify when they must bear extra costs, when things will take extra time, etc. > Explain that equipment and/or machinery they install is their responsibility (unless the lease says otherwise) ▪ Acknowledge through intent and action that the stakeholders' and management's concerns are being viewed with a level of importance ▪ Record and report complaints and requests to management/owner |

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

| Task | Steps |
|--|---|
| 4.3 Manage resource and budget expectations of senior executives to operate safely and efficiently | <ul style="list-style-type: none"> ▪ Maintain positive relationships with all people who are involved with the asset: <ul style="list-style-type: none"> > Establish rapport with management/owners > Explain your limitations, qualifications, abilities > Share information ▪ Review leases to maintain knowledge of contents and requirements: <ul style="list-style-type: none"> > Identify the requirements and obligations of owner and tenant for tenant improvements > Identify implications of improvements on overall asset maintenance |

Duty 5: Act as ambassador for the organization

| Task | Steps |
|---|--|
| 5.1 Conduct client relations collaboratively | <ul style="list-style-type: none"> ▪ Reflect company culture and values ▪ Meet with new tenants to make introductions ▪ Visit tenants regularly (F2F) to see if they need anything ▪ Build good relationships ▪ Use a good customer service approach to deliver information |
| 5.2 Communicate effectively with other team members | <ul style="list-style-type: none"> ▪ Do rounds or in-person visits throughout the building to share information and get news or feedback from staff ▪ Build good relationships ▪ Seek client feedback routinely: <ul style="list-style-type: none"> > In person > Phone > Survey > Other ▪ Follow up on service requests after service: <ul style="list-style-type: none"> > Solicit feedback informally or formally > Do checks (could be random) |

Duty 5: Act as ambassador for the organization

| Task | Steps |
|---|---|
| 5.3 Engage professionally with all stakeholders | <ul style="list-style-type: none">▪ Model company culture and values:<ul style="list-style-type: none">> Ensure social media is aligned with the company culture▪ Represent the organization positively when engaging with anyone when:<ul style="list-style-type: none">> On the job – Ensure contractors behave professionally and reflect the company culture> Off the job – Behave appropriately after work hours in public places▪ Show respect when working in tenant space:<ul style="list-style-type: none">> Leave space tidy and clean after providing service▪ Be sensitive to tenant rights:<ul style="list-style-type: none">> Respect privacy concerns▪ Respect considerations and/or needs▪ Use a professional tone when speaking▪ Use non-verbal communication tactics:<ul style="list-style-type: none">> Make eye contact▪ Use facial gestures and utterances that indicate reception and understanding |

Duty 6: Maintain currency with education and standards

| Task | Steps |
|---|---|
| 6.1 Maintain knowledge of and compliance with legislation and regulations | <ul style="list-style-type: none">▪ Be aware when regulations change▪ Take advantage of learning opportunities▪ Comply with ongoing and new regulations (e.g.: perform testing (like water testing for bacteria) as required by government:<ul style="list-style-type: none">> Report as needed> Identify expenses that need to be passed on to tenants> Communicate expenses to tenants, management/owners and owners |
| 6.2 Maintain knowledge of technology | <ul style="list-style-type: none">▪ Recognize the trend towards increased computer-based building operation▪ Stay up to date on:<ul style="list-style-type: none">> The evolution of “smart” system technology> How control systems function in a building, taking into consideration that they are constantly changing, including how they interact▪ Take training as needed and when directed to stay current▪ Maintain comfort level with computer work▪ Get information from safety authorities▪ Relay new learnings to management/owner, contractors and vendors |

Duty 6: Maintain currency with education and standards

| Task | Steps |
|-------------------------------|---|
| 6.3 Prioritize learning needs | <ul style="list-style-type: none">▪ Develop long-range learning and development plans based on personal aspirations▪ Identify priority needs▪ Take advantage of company training budget – be aware of what it is▪ Communicate with management/owner when you want to take training; be able to explain why it's relevant▪ Maintain awareness of trends in building operations▪ Monitor BOMA, or industry governing body, for direction on changes, new regulations and associated training▪ Be aware of gaps in knowledge or weaknesses and propose training accordingly▪ Utilize resources such as co-workers, industry peers and contractors to grow skill set▪ Remain aware of technological applications for building systems |

Property Manager

The Building Owners and Managers Association of British Columbia (BOMA BC) has developed an occupation profile of the Property Manager (PM) occupation in conjunction with other ongoing efforts to prepare a Sector Talent Strategy Implementation that integrates existing information regarding the economic trends affecting the Commercial Property and Facilities Management sector, talent shortage for the Property Manager and Building Operator occupations, and available education and training opportunities.

The ultimate aim of the strategy is to establish a competency assessment tool that practitioners can use to identify aspects of their job performance that require attention and direct them to appropriate sources of performance improvement opportunities.

The occupation profile was completed in two steps: interviewing representatives of the occupation who are considered experts and enjoy the respect and support of their peers; and facilitating a brainstorming session with a group of representative practitioners currently performing the occupation to identify:

- The duties, tasks, steps, and other elements that the occupation comprises
- Knowledge and skills required to perform the occupation
- Typical equipment, material, and specific conditions under which the occupation is performed

The resulting occupation profile can be used for a variety of purposes including, but not limited to, selecting Commercial Property and Facilities Management as a career choice, identifying entry and development and certification requirements, and developing learning interventions and performance support mechanisms needed to help practitioners perform their occupations proficiently and in compliance with the industry in general and regulations, policies, and procedures of employers specifically.

This occupation profile will also be used to inform the competencies a practitioner needs to demonstrate proficiency in performing the occupation.

Note: *This occupation profile contains descriptions that accurately reflect how the occupation is performed at a particular point in time (June 2020). It is intended that this will be a “living” document that is updated regularly.*

Occupation

A Property Manager (PM) is one of two umbrella categories of occupations in the Commercial Property and Facilities Management sector.

The PM occupation is a generic title. Depending on the terms of their employment, a PM may or may not perform all the duties and tasks specified for the occupation or perform them to the same level of completion, and hence employees may hold various titles, depending on their employer.

Regardless, a PM is generally considered to be a managerial position in the Commercial Property and Facilities Management sector whose overall function is to manage the administration and operation of the physical asset and its contractual obligations to an optimal level, while ensuring all technical and practical aspects of building/property operations are in keeping with industry standards and owners' goals.

The PM's main focus of attention is on financial, as opposed to technical and practical, aspects of operating a building or other property to ensure its safe and efficient use. In doing so, the PM protects and maximizes the value of the real estate asset for the owner.

The PM acts as an interface and liaison between tenants and property users and owners, ensuring that the tenants and users receive high-quality, uninterrupted service in well-maintained properties.

PMs require a high degree of managerial, planning, and financial knowledge and aim for mastery in their field.

The Commercial Property and Facilities Management sector is increasingly subject to technological change, especially with respect to computer-based and information technology. Property Managers face the challenge of buildings continually "getting smarter," with the application of highly sophisticated mechanical and operating systems that are significantly changing how buildings are operated and managed. The shift toward knowledge and technology-based work means that PMs will have to engage in relevant education and training in their ongoing learning and development efforts.

Their superior leadership and technical skills, combined with an ongoing increase in demand for improved quality of service, make them capable providers of excellent customer service.

Depending on the size of the company, PMs may also be directly responsible for managing capital construction for upgrading/improving an existing property/asset either for the owner or a tenant. This requires a PM to have a solid foundation in building construction and project management knowledge and an aptitude and interest in further developing these skill sets throughout their career.

Workplace Conditions

The PM faces issues and/or conditions that prevail in the working environment that may help or hinder their ability to perform the occupation. Following is a list of issues and/or conditions that typically prevail in the workplace:

- Continuous change
- Lack of clear, consistent job descriptions
- A PM must:
 - > Be a self-starter who is self-motivated and directed

- > Use a creative approach to problem solving and decision making
- > Identify, plan, and communicate the need to upgrade or improve an asset
- > Separate management of capital and operating budgets
- A PM must be able to:
 - > Perform under pressure
 - > Engage in continuous learning and development, especially regarding safety and legal and environmental regulations

Conditions that hinder the ability of a PM to perform the occupation:

- Range of age of assets – from legacy buildings to newly built
- Some standards are not clearly articulated and are missing from PMs' initial education
- Need to balance special capital projects vs. regular capital operation; upon completion of a capital improvement, PMs then need to operate it

Conditions that help PMs perform their occupation:

- Direct support of senior management (directors/VPs), industry mentors, peers and colleagues, and owner(s)
- Continuous input of market trends
- Personal empowerment
- Challenging and dynamic working environment

Tools, Skill, and Knowledge Requirements

Tools

The following tools are used on the job and applied commonly throughout all duties and tasks that the PM occupation comprises.

- Personal computer
- Cell phone
- Email
- Internet
- MS Office applications
- Documentation
- Vehicle/driver's licence/clean driver's record

Skills

The position requires the PM to have the following well-developed set of skills, which are considered fundamental to be able to perform the PM occupation.

- Analysis
- Prioritization
- Decision making
- Planning, especially financial
- Organization
- Communication (written, verbal, non-verbal)
- Interpersonal relations (public relations, community relations, customer relations, tenant relations, “people” skills)
- Teamwork
- Budget development (capital and operating)
- Negotiation (e.g., lease)
- Financial management (record keeping, financial statement preparation, interpretation and analysis, reporting)
- Time management
- Project management
- Working collaboratively
- Customer service (dealing with difficult people, dealing with difficult situations)

Knowledge

The position requires the PM to have the following knowledge about building operation, which is considered fundamental to be able to perform the PM occupation:

- Basic accounting principles, including budgeting (revenue, recoverable operating and non-recoverable operating, and capital planning/amortization elements)
- Technical Safety BC and Building Code Regulations
- WorkSafeBC and OHS regulations and safety procedures
- Human Resource Management and Employment Standards Regulations
- Mechanical and operating systems (HVAC)

If a PM is also responsible for managing capital construction projects, they must have a functional knowledge of:

- Building construction process (upgrade/improvement and new property construction)
- Financial budgeting, tracking, and oversight
- Contract law and tendering process
- Project planning and management
- Legal aspects
- Reading and interpreting plans and drawings
- Working collaboratively and directing the work of Building Operators, contractors, and vendors

Duties and Tasks

| Duty | Tasks |
|---|--|
| <p>1. Manage an asset's financial condition in keeping with industry standards and owners' goals</p> | <p>1.1 Prepare and maintain operating budget</p> <p>1.2 Prepare and maintain capital budget</p> <p>1.3 Maintain financial agreements including leases and licences</p> <p>1.4 Interpret financial statements and report on budgetary variances</p> <p>1.5 Conduct cashflow forecasting and analysis</p> <p>1.6 Manage transactions including receivables and payables</p> <p>1.7 Manage an asset's financial condition in keeping with the owner's goals</p> <p>1.8 Manage construction of a capital project</p> |
| <p>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</p> | <p>2.1 Monitor the overall condition of all components of the physical asset</p> <p>2.2 Oversee physical plant operation</p> <p>2.3 Manage contracts for services</p> <p>2.4 Handle incidents and insurance claims</p> <p>2.5 Maintain the lease obligations of all parties to the agreement</p> |
| <p>3. Manage and oversee the administration of an asset to maximize/meet the owner's goals in keeping with industry standards</p> | <p>3.1 Maintain accurate property/building documentation</p> <p>3.2 Manage tenant responsibilities</p> <p>3.3 Manage personnel including staff and contractors</p> |
| <p>4. Oversee internal and external market relations</p> | <p>4.1 Conduct tenant relations and retention activities</p> <p>4.2 Maintain currency with market trends</p> <p>4.3 Conduct social, charitable, community programming, and business development events</p> |

| Duty | Tasks |
|---|---|
| 5. Develop sustainable practices in the operation of the property asset in keeping with local, provincial and national standards, and owner and tenant goals | 5.1 Optimize the asset's energy efficiency 5.2 Undertake waste management programs 5.3 Promote environmental responsibility with tenants and external parties |

Duties, Tasks, and Steps

| Duty 1: Manage an asset's financial condition in keeping with industry standards and owners' goals | |
|--|---|
| Task | Steps |
| 1.1 Prepare and maintain operating budget | <ul style="list-style-type: none"> ▪ Review items that make up costs: <ul style="list-style-type: none"> > Property tax > Utility management > Insurance > Maintenance – based on contracts in place or that will be in place ▪ Manage operating (immediate) costs: <ul style="list-style-type: none"> > Review leases to understand their portion of operating costs > Approach tenants to contribute based on leases > Monitor expenditures ▪ Conduct risk assessments and appraisals ▪ Report progress to owner ▪ Protect (maintain or improve) net operating income year over year |
| 1.2 Prepare and maintain capital budget | <ul style="list-style-type: none"> ▪ Review plans and goals: <ul style="list-style-type: none"> > Construction to replace or upgrade “big-ticket” items to create efficiency and value > Add-ons > Review 5- to 10-year costs ▪ Discuss goals with owners: <ul style="list-style-type: none"> > Identify what can be recovered from amortizations (spread out loan payments over time) > Revenue and recoveries (rent, parking, etc.): <ul style="list-style-type: none"> ▫ Review rent schedules with accounting ▫ Review leases for rent recovery ▪ Manage capital costs (may require project management): <ul style="list-style-type: none"> > Monitor costs > Report progress to owner |

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

| Task | Steps |
|---|---|
| <p>1.3 Maintain financial agreements including leases and licences</p> | <ul style="list-style-type: none"> ▪ Maintain knowledge of types of leases and how they operate ▪ Determine management: <ul style="list-style-type: none"> > Directly: <ul style="list-style-type: none"> ▫ Typically, PMs negotiate lease renewals ▫ Handle minor lease agreements such as parking, storage, signage, etc. > Contract out: <ul style="list-style-type: none"> ▫ Typically, PMs outsource leasing of vacant spaces to leasing agents ▫ Ensure leasing agents are representing properties properly ▪ Monitor financial agreements, leases, licenses: <ul style="list-style-type: none"> > Give feedback on agreements, make suggestions, answer questions, etc. |
| <p>1.4 Interpret financial statements and report on budgetary variances</p> | <ul style="list-style-type: none"> ▪ Liaise with Accounting Department, if one exists, or with whoever does accounting ▪ Be responsible and accountable ▪ Respond to questions from owners ▪ Use correct coding and reporting ▪ Manage accounts receivable ▪ Manage accounts payable: <ul style="list-style-type: none"> > Review property tax assessments; report to owner and discuss appeals > Review insurance policies – do repair/replacement cost studies ▪ Review financial statements per budget <ul style="list-style-type: none"> > Identify and report variances > Make adjustments as necessary > Report to owner |

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

| Task | Steps |
|--|--|
| <p>1.5 Conduct cashflow forecasting and analysis</p> | <ul style="list-style-type: none"> ▪ Determine frequency: <ul style="list-style-type: none"> > Normally done monthly > Other: <ul style="list-style-type: none"> ▫ Bi-monthly ▫ Daily due to unforeseen circumstances ▪ Review and reassess when circumstances change |
| <p>1.6 Manage transactions including receivables and payables</p> | <ul style="list-style-type: none"> ▪ Meet regularly with accountants to look at cash distribution with owners, esp. with large invoices such as insurance and property tax <ul style="list-style-type: none"> > Ensure there is enough money to cover large and unforeseen expenses ▪ Distribute cash to owners on a monthly basis (operating income for their investment) ▪ Make operating cost adjustments and bill to tenants (or report actuals vs. forecasted) |
| <p>1.7 Manage an asset's financial condition in keeping with the owner's goals</p> | <ul style="list-style-type: none"> ▪ Be aware of and maintain asset class ▪ Be aware of owner's fiscal goals ▪ Manage lease renewals: <ul style="list-style-type: none"> > Conduct process: <ul style="list-style-type: none"> ▫ Prepare lease agreement ▫ Review comparable rate studies, etc. > Present and discuss with management/owner and tenants ▪ Be aware of condition/age of building ▪ Maintain operating income as projected at time of asset purchase (ROI = net operating income divided by asset purchase price) ▪ Risk assessments (feeds into insurance premiums) |

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

| Task | Steps |
|--|--|
| <p>1.8 Manage construction of a capital project (upgrade/improve existing property/asset or build new one)</p> | <ul style="list-style-type: none"> ▪ Determine construction management: <ul style="list-style-type: none"> > Directly (plan, manage budget, implement) > Contract out (e.g.: Project Manager) ▪ Scope the project: <ul style="list-style-type: none"> > Secure Project Manager/consultants to forecast work requirements > Review reports > Solicit tenders > Determine costs ▪ Create a capital construction budget ▪ Communicate project information to tenants: <ul style="list-style-type: none"> > Translate information from Project Manager, general contractor, tradespeople into language tenants can understand > Identify schedule and strategies to manage delays > Communicate costs and cost overruns with tenants if appropriate > Act as go-between between tenant and owner if appropriate ▪ Coordinate construction <ul style="list-style-type: none"> > Perform project management or oversee Project Manager > Report progress to owner |

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 | Steps |
|--|--|
| <p>2.1 Monitor the overall condition of all components of the physical asset</p> | <ul style="list-style-type: none"> ▪ Review budget for preventative maintenance: <ul style="list-style-type: none"> > 10-year plan > Immediate ▪ Determine when repairs or upgrades are needed: <ul style="list-style-type: none"> > HVAC > Elevators > Large and unforeseen expenses > Other ▪ Work with Building Operator (if there is one): <ul style="list-style-type: none"> > Determine level of involvement in implementation > Be accountable for the condition of the physical asset ▪ Prepare documentation and report to owner |
| <p>2.2 Oversee building operation</p> | <ul style="list-style-type: none"> ▪ Determine appropriate party: <ul style="list-style-type: none"> > Building Operator (if there is one) > Third-party companies with an operations department for multiple buildings ▪ Ensure they have the skill and tools to do the work ▪ Prepare documentation and report to owner |

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 | Steps |
|--|---|
| <p>2.3 Manage contracts for service</p> | <ul style="list-style-type: none"> ▪ Review ongoing contracts regularly ▪ Negotiate with contractors and vendors ▪ Maintain good relationships with trades ▪ Manage work: <ul style="list-style-type: none"> > Schedule inspections, service delivery and contractor work > Monitor work done > Ensure funds are available to pay for work > Arrange payment ▪ Administer contracts and agreements with sensitivity and fairness ▪ Prepare documentation and report to owner |
| <p>2.4 Handle incidents and insurance claims</p> | <ul style="list-style-type: none"> ▪ Perform safety risk assessments or verify they are performed regularly by the building insurance company ▪ Complete incident reports ▪ Administer insurance claims according to carrier protocols ▪ Schedule fire inspections ▪ Conduct inspections: <ul style="list-style-type: none"> > Trip-and-fall hazards > Blockages > Other > List specific details about equipment or the physical plant ▪ Prepare documentation and report to owner |

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 | Steps |
|--|--|
| 2.5 Maintain the lease obligations of all parties to the agreement | <ul style="list-style-type: none">▪ Develop lease or parking agreements▪ Contribute to owner’s financial framework and recovery framework▪ Manage transactions including receivables:<ul style="list-style-type: none">> Default management:<ul style="list-style-type: none">▫ Select options for recovery, possession, implications of tenant default> Rent payments▪ Ensure rules and regulations are being met (e.g., exits, decks, public safety, fire systems, moorage on waterfront, how many people are allowed in a space, cleanliness standards, etc.)▪ Coordinate tenant upgrades/modifications and invoice them▪ Prepare documentation and report to owner |

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

| Task | Steps |
|---|--|
| 3.1 Maintain accurate property/building documentation | <ul style="list-style-type: none">▪ Determine management:<ul style="list-style-type: none">> Self> Lease administration department▪ Develop appropriate documentation:<ul style="list-style-type: none">> Standard Operating Procedures (SOPs)> Emergency plans> Environmental and specialty consultant reports> Warranties> Service contract documentation and correspondence> Lease documentation and correspondence> Etc.▪ Maintain documentation:<ul style="list-style-type: none">> Keep SOPs up to date> Create and maintain emergency plans> Complete special reports> Maintain lease documentation and correspondence▪ Manage storage and access▪ Prepare documentation and report to owner |

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

| Task | Steps |
|---|--|
| <p>3.2 Manage tenant responsibilities</p> | <ul style="list-style-type: none"> ▪ Manage tenant insurance: <ul style="list-style-type: none"> > Confirm they have provided certificate of insurance > Confirm insurance meets lease obligations ▪ Communicate with tenants about: <ul style="list-style-type: none"> > Rent changes > Step-ups > Contact information > Payment (cheque, direct deposit or electronic funds transfer) ▪ Pull credit reports on potential tenants ▪ Maintain tenant information privacy and confidentiality ▪ Maintain currency of tenant improvements: <ul style="list-style-type: none"> > Review building/work plans and give approval > Coordinate with construction or Project Manager if necessary > Pay out tenant improvement allowances ▪ Manage warranties: <ul style="list-style-type: none"> > Be aware of what's covered > Protect warranties: <ul style="list-style-type: none"> ▫ Conduct preventative maintenance ▫ Conduct inspections ▪ Prepare documentation and report to owner |

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

| Task | Steps |
|---|--|
| <p>3.3 Manage personnel including staff and contractors</p> | <ul style="list-style-type: none"> ▪ Determine management: <ul style="list-style-type: none"> > Human Resources department if one exists > Building Operator or BO department > Self – Hire and supervise contractors and maintenance personnel ▪ Manage all personnel: <ul style="list-style-type: none"> > Ensure compliance with: <ul style="list-style-type: none"> ▫ WCB clearances ▫ Insurance ▫ Law and regulations: <ul style="list-style-type: none"> • Asbestos • Ladder protocols • Confined space • Etc. > Ensure currency/training on best practice: <ul style="list-style-type: none"> ▫ WHMIS ▫ Hazardous materials ▪ Ask questions and ensure anyone working in the building is up to date ▪ Arrange for fast training, annual training ▪ Review OHS regulations (PM is defined as a supervisor) ▪ Complete incident reports/WCB claims for contractors and technicians ▪ Prepare documentation and report to owner |

Duty 4: Oversee internal and external market relations

| Task | Steps |
|---|--|
| 4.1 Conduct tenant relations and retention activities | <ul style="list-style-type: none"> ▪ Develop and implement a well-articulated tenant retention plan: <ul style="list-style-type: none"> > Identify lease renewal information and get in touch proactively to discuss their intentions > Visit properties so you can see what's actually going on > Make sure owner is aware of issues that might affect tenants > Notify tenants of work that will impact them > Be aware of building issues that might affect retention: <ul style="list-style-type: none"> ▫ HVAC ▫ Janitorial ▫ Elevators ▫ Parking (need for more or less space, etc.) > Manage expectations ▪ Conduct positive tenant relations: <ul style="list-style-type: none"> > Conduct regular (e.g., monthly) meetings in person or via electronic meeting applications, especially with large tenants with complicated operations > Be able to identify everyone and what they're doing > Identify tenant issues (some will not mention anything) > Act as liaison between tenants and owner; rephrase/soften messages if necessary > Be aware of tenants who are having financial problems: <ul style="list-style-type: none"> ▫ Be proactive – avoid surprises ▫ Understand their circumstances and the market > Administer promotion, signage > Conduct surveys: <ul style="list-style-type: none"> ▫ Tenants ▫ Occupants ▫ Employees ▫ Maintenance personnel ▫ Janitorial service providers ▫ Other |

Duty 4: Oversee internal and external market relations

| Task | Steps |
|---|---|
| <p>4.2 Maintain currency with market trends</p> | <ul style="list-style-type: none"> ▪ Be aware of the market and how it might affect tenant retention ▪ Participate in BOMA BC: <ul style="list-style-type: none"> > Maintain membership > Attend events/presentations > Stay up to date with industry changes ▪ Be aware of initiatives taken by municipalities ▪ Meet with industry peers ▪ Review commercial real estate brokerage market reports: <ul style="list-style-type: none"> > Vacancies > Rents > Construction ▪ Be aware of trends (e.g.: building code changes) ▪ Share what you learn with tenants and management/owner |
| <p>4.3 Conduct social, charitable, community programming, and business development events</p> | <ul style="list-style-type: none"> ▪ Conduct business development activities: <ul style="list-style-type: none"> > Talk to various publics about what they are interested in and need, and how you can connect > Promote your property or properties > Work with owner: <ul style="list-style-type: none"> ▫ Identify corporate social responsibility ▫ Represent the company brand in public ▪ Identify opportunities to give back to the community ▪ Maintain contact with Chamber of Commerce or other community organizations ▪ Participate in company-sponsored events or make donations |

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 | Steps |
|--|---|
| <p>5.1 Optimize asset's energy efficiency</p> | <ul style="list-style-type: none"> ▪ Identify BOMA BEST resources: <ul style="list-style-type: none"> > Attend webinars and events > Study website > Participate in BOMA BEST program ▪ Implement best practices outline in the BOMA BEST program: <ul style="list-style-type: none"> > Assess all buildings through environmental & sustainability lens > Perform ongoing monitoring of properties > Track utility consumption, waste diversion and air quality: <ul style="list-style-type: none"> ▫ Determine how to manipulate and improve ▫ Educate tenants to make the changes > Communicate with contractors and service providers to learn about new standards or code changes > Take advantage of financial incentives to reduce costs (e.g.: LED upgrades, EV charging stations, etc.) > Interpret and implement other practices: <ul style="list-style-type: none"> ▫ Green leases ▫ Targets ▫ Etc. |
| <p>5.2 Undertake waste management programs</p> | <ul style="list-style-type: none"> ▪ Conduct waste audits on properties ▪ Be on the alert for upcoming programs (e.g.: organic waste began as one contractor and one building investing and educating their tenants): <ul style="list-style-type: none"> > Maintain contact with service contractors > Identify impact on budget and operating expenses ▪ Encourage programs (uptake varies depending on property, owner's goals, etc.) ▪ Study landscaping chemicals and ensure they aren't harmful ▪ Talk to municipality to understand best practices and options available in that region for waste management |

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 | Steps |
|---|---|
| <p>5.3 Promote environmental responsibility with tenants and external parties</p> | <ul style="list-style-type: none"> ▪ Remain aware of changes in standards and best practices ▪ Provide education opportunities to tenants: <ul style="list-style-type: none"> > Waste > Power/energy savings > New legislation (e.g.: proposal that buildings be required to advertise their energy consumption) ▪ Provide staff training on environmental standards ▪ Manage permits (e.g., Technical Safety BC) ▪ Engage in conversations with tenants early so owners/tenants aren't taken by surprise: <ul style="list-style-type: none"> > Rebates on (Light-Emitting Diode (LED) lighting > Electric Vehicle (EV) stations > Etc. ▪ Share information gathered: <ul style="list-style-type: none"> > Sustainability reports > Results of waste audits > Business cases for environmental improvements ▪ Produce and distribute information: <ul style="list-style-type: none"> > Newsletter > Website > Social media |

JOB DESCRIPTIONS

The job descriptions are provided as a supplementary product of the occupation profiles. The occupation profile process informs and provides guidance for the development of not only job descriptions but also:

- Performance support and improvement interventions
- Learning and development programs
- Certification standards

We have taken the liberty of drafting these job descriptions to provide an example of what a job posting for a BO or PM could look like. However, it should be noted that these drafts do not include suggested qualifications, as more input will be required to determine what these would be.

In the process of conducting the Literature and Environmental Scan and analyzing the occupations, many academic terms were revealed. Accordingly, they are included in the documentation we have prepared for this project, but recognizing that not all of these terms are familiar to or used by practitioners, we have prepared glossary of terminology, which can be found on the final page of this report.

Job Description – Building Operator

Position

A Building Operator (BO) is one of two occupations in the Commercial Property and Facility Management sector.

The BO occupation is a generic title, as people employed to perform the occupation may have different titles and job descriptions depending on their employer.

Regardless, a BO is generally considered to be a strategic position in the Commercial Property and Facilities Management sector whose overall function is to ensure the safe, efficient and sustainable operation, maintenance and stewardship of property assets (regardless of the asset's form, such as office buildings, retail/open-air properties, light industrial facilities and buildings, and mixed-use properties) at an optimal level, in keeping with industry standards and owners' goals.

Their main focus of attention is on technical and practical, as opposed to financial, aspects of operating a building or other property to ensure its safe and efficient use.

They act as an interface and liaison between tenants and property users and management/owners, ensuring that the tenants and users receive high-quality, uninterrupted service in well-maintained properties.

BOs are also responsible for responding to personal and technical problems as they arise.

Upon hiring, a BO has a high degree of technical knowledge and skill and superior leadership ability. This, combined with their aim for mastery and ongoing desire to improve the quality of service and equipment under their management, makes them capable providers of excellent customer service. Work is performed independently with oversight from the property owner and, if one exists, Property Manager.

Buildings are continually “getting smarter,” with the application of highly sophisticated mechanical and operating systems that are significantly changing how buildings are operated and managed. A BO has a high degree of experience with computer-based and information technology, which they use in conjunction with their ongoing learning and development efforts.

Workplace

This occupation is primarily performed/located in the owner's property (office buildings, retail/open-air properties, light industrial facilities and buildings, and mixed-use properties). The BO may also be required to work off-site from time to time such as working-from-home and visits to connect with the owner, management and stakeholders.

Responsibilities

There are six areas of responsibility for which a person hired to perform the occupation has authority and is accountable.

Provide stewardship of the asset to ensure its longevity and value to the owner and users (overall main duty):

- Develop and document preventative maintenance and long-term capital maintenance plans
- Forecast repairs
- Manage repairs
- Respond to urgent maintenance requirements

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

- Perform various inspections regularly
- Maintain documents
- Provide education and notification
- Participate in committees
- Conduct risk assessments
- Manage personal safety of various stakeholders
- Maintain asset safety plans

Work with management to ensure financial stability:

- Establish maintenance, repair and replacement costs
- Develop operating and capital budgets
- Prioritize critical components and safety
- Monitor performance against budget
- Collaborate in budget reviews

Manage expectations of various stakeholders:

- Work collaboratively to manage expectations of users
- Manage complaints, needs and requests for maintenance and modifications
- Manage resource and budget expectations of senior executives to operate safely and efficiently

Act as ambassador for the organization:

- Conduct client relations collaboratively
- Communicate effectively with other team members
- Engage professionally with all stakeholders

Maintain currency with education and standards:

- Maintain knowledge of and compliance with legislation and regulations
- Maintain knowledge of technology
- Prioritize learning needs

Knowledge, Skills, and Abilities

The BO must have knowledge of:

- Typical conditions that prevail in the working environment in the Commercial Property and Facilities Management sector
- Budget building (capital and operating)
- Working collaboratively (owners, contractors, staff, stakeholders, tradespeople, vendors)
- WorkSafeBC, Technical Safety BC and other regulations
- Occupational Health and Safety Act, knowledge of Workplace Hazardous Materials Information Systems (WHMIS) and First Aid and CPR training
- Safety procedures for BOs and contractors
- Basic/appropriate comprehension of how to use mechanical and diagnostic tools
- Safe chemical storage
- Mechanical operating systems (HVAC)

The BO must have skill in:

- Analysis
- Organization
- Communication (written, verbal, non-verbal)
- Prioritization (triage)
- Decision making
- Planning
- Troubleshooting
- Interpersonal relations
- Customer service (dealing with difficult people, dealing with difficult situations)
- Teamwork
- Time management
- Software application operation
- Parts repair
- Use of various tools

The BO must be:

- Detail oriented
- Solutions focused
- Self-starter with a positive attitude, able to take the initiative, and willing to work overtime and respond to emergencies
- Able to:
 - > Show excellent computer literacy and ability to operate software at an expert level
 - > Work independently with minimal direction, adapt to changing work conditions including interruptions, and respond quickly to emergency situations

Job Description – Property Manager

Position

A Property Manager (PM) is one of two occupations in the Commercial Property and Facilities Management sector.

The PM occupation is a generic title, as people employed to perform the occupation may have different titles and job descriptions depending on their employer.

Regardless, a PM is generally considered to be a managerial position whose overall function is to manage the administration and operation of the physical asset and its contractual obligations to an optimal level, while ensuring all technical and practical aspects of building/property operations are in keeping with industry standards and owners' goals.

Their main focus of attention is on financial, as opposed to technical and practical, aspects of operating a building or other property to ensure its safe and efficient use. In doing so, the PM protects and maximizes the value of the real estate asset for the owner.

They act as an interface and liaison between tenants and property users and owners, ensuring that the tenants and users receive high-quality, uninterrupted service in well-maintained properties.

Depending on the size of the company, PMs may also be responsible for managing capital construction for upgrading/improving an existing property/asset either for the owner or a tenant, or building a new one. This requires a PM to have a high degree of building construction and project management knowledge.

Upon hiring, a PM requires a high degree of managerial, planning and financial knowledge, superior leadership and technical skills. This, combined with their aim for mastery and ongoing desire to improve the quality of service, makes them capable providers of excellent customer service. Work is performed independently with oversight from the property owner.

Buildings are continually “getting smarter,” with the application of highly sophisticated mechanical and operating systems that are significantly changing how buildings are operated and managed. A PM has a high degree of experience with computer-based and information technology, which they use in conjunction with their ongoing learning and development efforts.

Workplace

This occupation is primarily performed/located in the owner's property (office buildings, retail/open-air properties, light industrial facilities and buildings, and mixed-use properties). The PM may also be required to work off-site from time-to-time such as working-from-home and visits to connect with the owner, management and stakeholders.

Responsibilities

There are five areas of responsibility for which a person hired to perform the occupation has authority and is accountable.

Manage an asset's financial condition in keeping with industry standards and owners' goals (overall main duty):

- Prepare and maintain operating budget
- Prepare and maintain capital budget
- Maintain financial agreements including leases and licences
- Interpret financial statements and report on budgetary variances
- Conduct cashflow forecasting and analysis
- Manage transactions including receivables and payables
- Manage an asset's financial condition in keeping with the owner's goals
- Manage construction of a capital project

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:

- Monitor the overall condition of all components of the physical asset
- Oversee physical plant operation
- Manage contracts for services
- Handle incidents and insurance claims
- Maintain the lease obligations of all parties to the agreement

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

- Maintain accurate property/building documentation
- Manage tenant responsibilities
- Manage personnel including staff and contractors

Oversee internal and external market relations:

- Conduct tenant relations and retention activities
- Maintain currency with market trends
- Conduct social, charitable and community programming and business development events

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

- Optimize the asset's energy efficiency
- Undertake waste management programs
- Promote environmental responsibility with tenants and external parties

Knowledge, Skills, and Abilities

The PM must have knowledge of:

- Typical conditions that prevail in the working environment in the Commercial Property and Facilities Management sector
- Budget development (capital and operating)
- Working collaboratively (owners, contractors, staff, stakeholders, tradespeople, vendors)
- WorkSafeBC, Technical Safety BC regulations
- Occupational Health and Safety Act, knowledge of Workplace Hazardous Materials Information Systems (WHMIS) and First Aid and CPR training
- Contract law
- Tendering process
- Mechanical operating systems (HVAC)

The PM must have skill in:

- Analysis
- Prioritization
- Decision making
- Planning, especially financial
- Organization and planning
- Communication (written, verbal, non-verbal)
- Interpersonal relations (public relations, community relations, customer relations, tenant relations, “people” skills)
- Customer service (dealing with difficult people or situations)
- Teamwork
- Budget development (capital and operating)
- Negotiation (e.g.: lease)
- Financial management (record keeping, financial statement preparation, interpretation and analysis, reporting)
- Time management
- Project management
- Operation of general office equipment (computer, copiers, scanners)

The PM must be:

- Detail oriented
- Solutions focused
- Self-starter with a positive attitude, self-motivated and directed, able to take the initiative
- Able to:
 - > Work independently with minimal direction and adapt to changing work conditions including interruptions
 - > Use a creative approach to problem solving and decision making
 - > Identify, plan and communicate the need to upgrade or improve an asset

GLOSSARY

| | |
|--------------------------------|---|
| Attribute | A broad aspect of an occupation employees must keep in mind when performing any task. It is not a competency, it is an overall attribute that represents an important aspect of the job function |
| Competency | A cluster of the knowledge, skills, abilities and attitudes a person needs to successfully perform a role or job, the activity that describes an essential performance outcome |
| Competency Profile | A document that describes the duties and tasks that comprise an occupation, a series of competencies for each task and the behaviours associated with each competency |
| Duty | A major area of responsibility for which a person hired to perform the occupation has the authority to plan and conduct operation and is accountable that is not actually performed |
| Job Task Analysis | An analysis of an occupation in terms of the activities required of a practitioner and conditions under which it is performed |
| Job-Specific Competency | A competency that is associated with the specific duties and tasks of an occupation |
| Occupation Profile | A document resulting from a job task analysis of an occupation including the knowledge, skills, tools, equipment, and conditions of the working environment in which it is performed |
| Task | An activity within a duty that is actually performed according to processes and procedures |
| Step | A step in a procedure to perform a task and, where appropriate, cautions, risks, tips, best practices and conditions, tools, equipment, etc. that exist in the working environment in which a task is completed |

The views and opinions expressed in this report are those of its author(s) and not the official policy or position of the Government of British Columbia.