

Graduated Licensing for Condo Managers and Conditional Licensing Expiring

Doug Dixon
Regulatory Compliance Advisor

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Overview

- New applicants into condominium management have two streams to obtain a licence.
- What is graduated licensing?
- What happens if I am currently unlicensed and taking condominium management courses?
- What happens to my licence if I still have conditions on my licence on renewal October 1st, 2023?

Options to Obtain a Condominium Manager Licence

1. Enter the industry with an unrestricted licence

- Complete eligibility
- Obtain a CCRC
- Complete Fundamentals and Practice of Condominium Management courses and exams
- Issued an unrestricted licence

2. Enter the Graduated Licensing Program

- Complete eligibility
- Obtain a CCRC
- Issued a restricted licence
- Complete Level 1 – one year to complete Fundamentals course and exam
- Complete Level 2 – Practices course and exam
- Issued an unrestricted licence

Graduated Licensing

Why graduated licensing?

- Shortage of people entering the condominium management industry
- High up-front cost of courses, exams and licensing fees in regular licensing process are a barrier to entry for some
- Applicants may not know if condominium management is a career they are suited for, phased entry allows the applicant time to experience the work
- Brokers get to assess a person under graduated licensing early in the process to see if they are suitable for condominium management work

Graduated Licensing

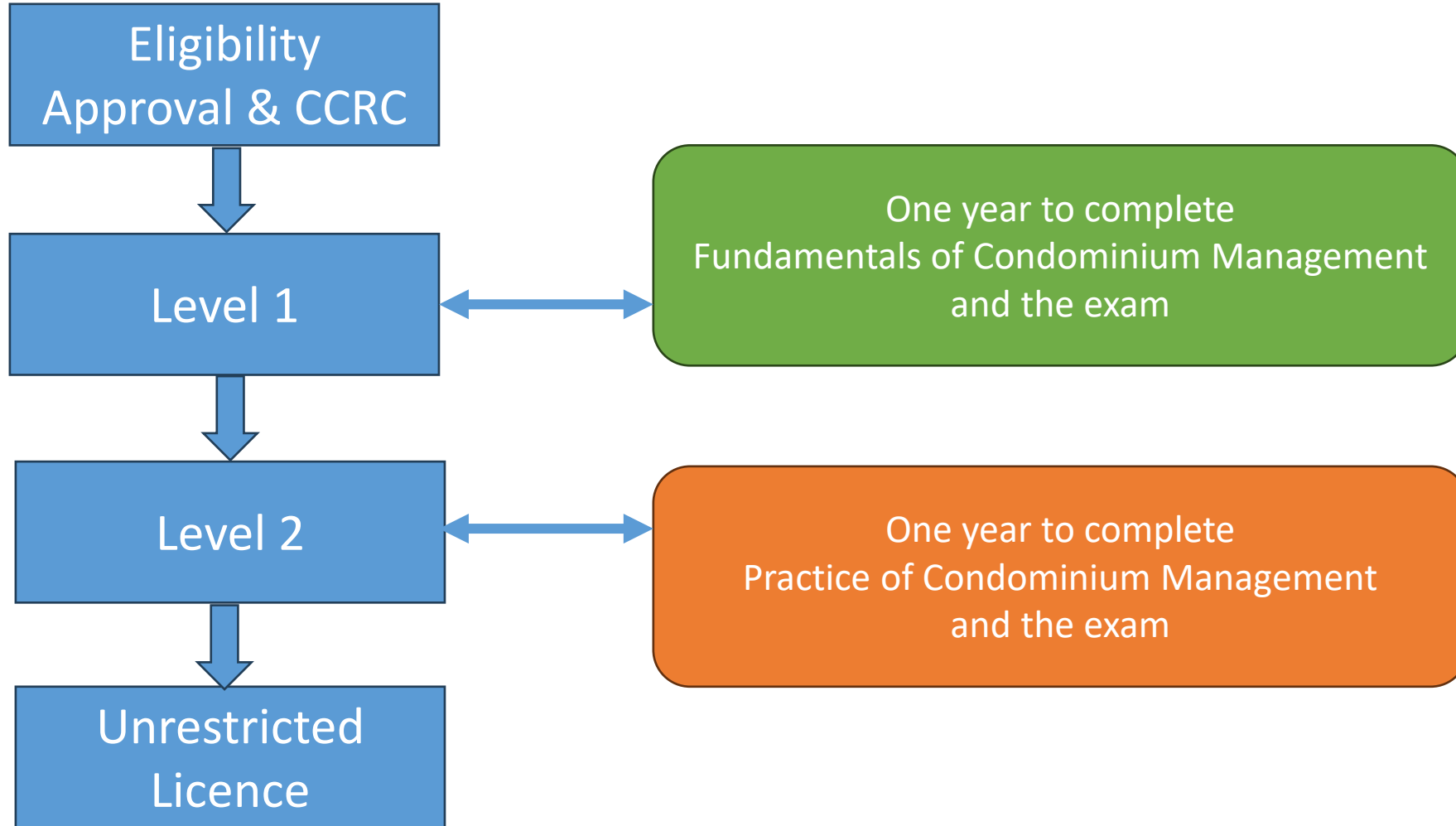
Persons going through graduated licensing are given a restricted licence subject to them completing courses and exams within specific timeframes.

A person who obtains a graduated licence must finish the complete program. If they fail to do so they cannot restart it. They would have to complete all courses and exams in order to re-apply for a licence.

When they apply for a graduated licence they will have to acknowledge and agree to the restrictions.

Their employing broker will have to acknowledge and agree to the restrictions, as well as agreeing to carry out the appropriate supervision.

Graduated Licensing Steps



GRADUATED LICENSING ACTIVITIES

Level 1

S = Supervised

Y = Can carry out the function

N = Cannot carry out the function

Condo Board Meetings

Preparation of meeting materials

This includes preparation and distribution of meeting materials.

S

Attending board meetings

The licensee can attend, but a mentor must be the main representative of the brokerage at the meeting.

S

Taking minutes

If appropriate, they can take the minutes and have their work reviewed by their mentor.

S

Taking part in discussions

They can participate in discussions to the degree that their mentor is comfortable.

S

Providing advice

The licensee can attend but is not to provide advice.

N

AGM Meetings

Preparation of meeting materials

This includes preparation and distribution of meeting materials.

S

Doing registration of unit owners and proxies

Mentor would need to train them on the process prior to attending an AGM

Y

Taking minutes

When appropriate, they can take the minutes and have their work reviewed by their mentor.

S

Answering questions from the floor

They may not respond to any questions.

N

Chairing the meeting

They may not accept a request from a board to chair the meeting

N

Management Service Agreements

Drafting of service agreements	They can work with a mentor in learning the ins and outs of creating service agreements for various types of condo corporations	N
Discussion of service agreements – proposal requests	They cannot discuss service agreements with board members or respond to proposal requests	N
Finalizing service agreements	They cannot be involved in finalizing a service agreement with a condo corporation	N

Miscellaneous

Carrying out board directives	This cannot be anything that conflicts with other restrictions under Phase 1	S
Dealing with charges/remuneration for supplementary services	No involvement is permitted. May observe what their mentor does	N
Assisting with transition from or to another condo management brokerage	They may coordinate with another brokerage the transfer of information, documents and property of the condo corporation involved	Y

Condo Unit Owners

Answer condominium owner general enquiries	This must be closely monitored by their mentor and would be subject to the abilities and background of the manager	S
Deal with unit owners on issues regarding tenants	This must be closely monitored by their mentor and would be subject to the abilities and background of the manager	S
Deal with emergency issues that arise	They should observe their mentor and not be the point of contact for emergency decisions	N

Dealing with Late Contributions

Discussions with board regarding arrears/ caveat process	They should observe their mentor and not respond to board enquiries	N
Dealing directly with unit owners disputing their status	They should observe their mentor and not respond to unit owners	N

Bylaw and Rules Enforcement

Discussions with board re fines	They should observe their mentor and not respond to board enquiries	N
Giving direction for notices to be sent out	This can be done under supervision of their mentor once they understand the procedures followed by the brokerage	S
Giving direction for fines to be sent out	This can be done under supervision of their mentor once they understand the procedures followed by the brokerage	S

Service Providers

Developing the terms for the quotes required by the board	This can be done under supervision of their mentor once they understand the procedures followed by the brokerage
Signing/executing of contracts	They are not to execute any contracts on behalf of condo corporations
Monitoring contract progress	This can be done under supervision of their mentor once they understand the procedures followed by the brokerage
Liaise with the board that the work has been completed satisfactorily	This can be done under supervision of their mentor once they understand the procedures followed by the brokerage

S
N
S
S

Financial

Explaining and answering general bookkeeping functions	This can be done under supervision of their mentor once they understand the bookkeeping system and procedures followed by the brokerage
Explaining and answering questions on monthly financials	This can be done under supervision of their mentor once they understand the bookkeeping system and procedures followed by the brokerage
Signing authority on accounts	They must not have signing authority on either brokerage trust or corporation bank accounts
Explaining and answering questions regarding recording/depositing of client money	This can be done under supervision of their mentor once they understand the bookkeeping system and procedures followed by the brokerage
Discussing fund investment options with the board	They may research and discuss the options with the board under the supervision of their mentor
Invest corporation funds	They must not have authority to invest corporation funds
Presenting the corporation's annual budget to the board	They can participate with their mentor in developing the budget, but they cannot present it to the board. They should observe their mentor's approach at presenting the budget

S
S
N
S
S
N
N

General

Act as a go between condo manager and board	They can relay information back and forth between their mentor and the board, but cannot initiate any actions on their own
Conduct a general inspection of properties' common areas	They can learn the policies and procedures of the brokerage and carry out inspections under the supervision of their mentor
Order items or routine repairs	They can learn the policies and procedures of the brokerage and carry out ordering items or routine repairs under the supervision of their mentor
Liaising with board the procedures regarding utility rooms/common property areas	They can learn the procedures from their mentor and carry them out under their mentor's supervision
Approving brokerage marketing materials	They cannot approve any marketing materials or marketing communications

Y
S
S
S
N

Answering questions from non-owners/tenants	When the mentor is comfortable with their knowledge and capabilities they can answer questions
Ensuring corporation records are complete and properly maintained	They can learn the procedures requirements of the corporations and the brokerage and carry out this activity under the supervision of their mentor
Ensuring the website portal for board members/unit owners is current	They can learn the procedures requirements of the corporations and the brokerage and carry out this activity under the supervision of their mentor
Responding to information contained on the portal/website	When the mentor is comfortable with their knowledge and capabilities, they can answer questions
Signing information statements, estoppels, caveats	They cannot sign any documents on behalf of the brokerage or corporation
Presenting and discussing insurance options with the board	They can work with their mentor in exploring options, but cannot discuss them with the board
Place insurance on behalf of condominium corporation	They cannot finalize any insurance arrangements on behalf of a corporation

S
S
S
S
N
N
N

Level 2

S = Supervised

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Condo Board Meetings

Preparation of meeting materials	This includes preparation and distribution of meeting materials.	Y
Attending board meetings	The licensee can attend, but a mentor must be the main representative of the brokerage at the meeting.	S
Taking minutes	If appropriate, they can take the minutes and have their work reviewed by their mentor.	Y
Taking part in discussions	They can participate in discussions to the degree that their mentor is comfortable.	Y
Providing advice	The licensee can attend but is not to provide advice.	S

AGM Meetings

Preparation of meeting materials	This includes preparation and distribution of meeting materials.	Y
Doing registration of unit owners and proxies	Mentor would need to train them of the process prior to attending an AGM	Y
Taking minutes	If appropriate, they can take the minutes and have their work reviewed by their mentor.	Y
Answering questions from the floor	They may respond to any questions to the degree that their mentor is comfortable.	S
Chairing the meeting	They may accept a request from a board to chair the meeting to the degree that their mentor is comfortable.	S

Management Service Agreements

Drafting of service agreements	They can draft agreements for various types of condo corporations for review by their mentor	S
Discussion of service agreements – proposal requests	They can discuss service agreements with board members or respond to proposal requests to the extent their mentor is comfortable	S
Finalizing service agreements	They cannot be involved in finalizing a service agreement with a condo corporation	N

Level 1 to Level 2 Comparison

Level 1

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Page 1

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Unlicensed Activities

The following activities are ones that do not require a licence. However, all these items are part of condominium management, and a condominium manager should be very knowledgeable of all the functions and processes in condominium management. As a knowledgeable professional, condo managers should understand the functions administrative staff are responsible for. They should also be able to answer questions from condo board members and unit owners as to how various administrative functions are carried out.

Registering documents with Land Titles

They should learn the process for registering documents at Land Titles. This should also include actually doing the registration of the document(s) a few times.

Responding to after hour service calls

They should understand brokerages procedures in detail so they can answer questions from board members or unit owners

Prepare and send out arrears letters

They should understand brokerages procedures in detail so they can answer questions from board members or unit owners

Sending out caveat warnings

They should understand brokerages procedures in detail so they can answer questions from board members or unit owners

Signing off on caveat notifications

They should understand brokerages procedures in detail so they can answer questions from board members or unit owners

Provide access to common areas for service providers carrying out work

They should understand brokerages procedures

Open condo units for service providers with owner consent

They should understand brokerages procedures

Setting up client files

They should understand brokerages procedures

Act as a courier to deliver or pickup documents and keys

They should understand brokerages procedures

Post notices in buildings/elevators

They should understand brokerages procedures

Answer and/or forward general calls and emails

They should understand brokerages procedures

Copy keys for brokerage client common areas or storage

They should understand brokerages procedures

Program fobs/openers, intercoms for building access

They should understand brokerages procedures

Secure public documents from the courthouse, utilities, services, etc.

They should understand brokerages procedures

Prepare/provide documents under Sec. 44 and Reg. 20.52 of the CPA Act*

They should learn the process for registering documents at Land Titles. This should also include actually doing the registration of the document(s) a few times.

- uploading them to a website
- providing them to an owner, purchaser or mortgagee

Prepare and send correspondence

They should understand the brokerage's standards

Witness documents

They should understand brokerages procedures

Notify unit owners of insurance changes

They should understand brokerages procedures

Students Currently Enrolled in Condo Man. Courses

Three Options After September 30, 2023

Complete
courses and exams
Apply for a licence

If your broker is unable to licence you, please wait to contact RECA until after the renewal period has concluded – no sooner than the second week of October

- No courses completed
- Enter Level 1 of Graduated Licensing
- Complete Fundamentals Course & Exam
- Enter Level 2 Complete Practices Course & Exam
- Unrestricted licence issued

- Fundamentals Completed
- Enter Level 2
- Complete Practices Course & Exam
- Unrestricted licence issued

Conditional Licensing Ends September 30, 2023

- Conditional licensing began on December 1, 2021
- All conditional licences expire September 30th, 2023
- Any condominium manager licensees with conditions outstanding on their licence as of September 30th are subject to downgrading or restrictions on their licence
- To prevent downgrading or restrictions licensees must complete the required course(s) and exam(s) prior to October 1st, 2023

Brokers with Conditions as of September 30, 2023

- Brokers cannot renew as a broker if there are conditions remaining on their licence
 - The options on the following slide will apply
- Brokers with outstanding conditions will either have to find a replacement broker or close their brokerage

Brokers with Conditions as of September 30, 2023

Three Scenarios

- No courses completed
 - Enter Level 1 of Graduated Licensing
- Complete Fundamentals Course & Exam
 - Enter Level 2 Complete Practices Course & Exam
- Unrestricted associate licence issued
 - Complete Broker Program & Exam
- Unrestricted broker or associate broker licence issued

- Fundamentals completed
 - Practices and Broker Program not completed
 - Enter Level 2 of Graduated Licensing
- Complete Practices course and exam
 - Unrestricted associate licence issued
- Complete Broker Program & Exam
 - Unrestricted broker or associate broker licence issued

- Fundamentals & Practices completed
 - Broker Program not completed
- Licence downgraded to Associate
 - Complete Broker Program Course & Exam
- Unrestricted broker or associate broker licence issued

Associate Brokers

- Any condominium manager with an associate broker licence, who has Fundamentals and Practice of Condominium management courses and exams complete, but who has not completed the Broker Program course and exam, will be required to downgrade their licence class to associate through the renewal process with broker acknowledgement.
- Whenever the licensee completes the Broker Program course and exam, their licence class will be automatically upgraded to associate broker.

Associate Brokers with Conditions as of September 30, 23

Three Scenarios

- No courses completed
 - Enter Level 1 of Graduated Licensing
- Complete Fundamentals Course & Exam
 - Enter Level 2
- Complete Practices Course & Exam
- Unrestricted associate licence issued
- Complete Broker Program & Exam
- Unrestricted associate broker licence issued

- Fundamentals completed
 - Practices and Broker Program not completed
- Enter Level 2 of Graduated Licensing
- Complete Practices course and exam
- Unrestricted associate licence issued
- Complete Broker Program & Exam
- Unrestricted associate broker licence issued

- Fundamentals & Practices completed
- Broker Program not completed
- Licence downgraded to Associate
- Complete Broker Program Course & Exam
- Unrestricted associate broker licence issued

Associate with Conditions as of September 30, 23

Three Scenarios

- Not renew
- Complete the required courses and exams
- Unrestricted associate licence issued

- No courses completed
 - Enter Level 1 of Graduated Licensing
 - Complete Fundamentals Course & Exam
 - Enter Level 2
- Complete Practices Course & Exam
- Unrestricted associate licence issued

- Fundamentals completed
- Practices not completed
- Enter Level 2 of Graduated Licensing
- Complete Practices course and exam
- Unrestricted associate licence issued

myRECA and Relicensing

- The myRECA system will respond with the appropriate options when you start your renewal process
- Any licensee whose licence is being downgraded will have to acknowledge and agree to the downgrading
- Their broker will also have to acknowledge and agree to the downgrading
- Any licensee with restrictions on their licence as of October 1st will have to acknowledge and agree to the restrictions
- Their broker will also have to agree to the restrictions and that they will supervise the restricted licensee as required

For Additional Information

Visit reca.ca

Doug Dixon: 403-685-7920
ddixon@reca.ca

Condominium Manager Licensing



Graduated Licensing Program

As of October 1, 2023, individuals joining the condominium manager industry can participate in a Graduated Licensing Program, which will allow them to perform certain restricted activities as part of a condominium manager brokerage as they complete their licensing education. Those individuals with an existing conditional licence who do not complete their education as required of the condition on their licence by September 30, 2023, will have their conditional licence downgraded into the Graduated Licensing Program. Please see below for full information about the program, and please review the [Graduated Licensing Program for Condominium Managers Task List](#).

RECA's Regulatory Compliance Advisor for Condominium Managers, Doug Dixon, will host a webinar for all condominium managers interested in learning about the new Graduated Licensing Program and how this affects both new, existing, and conditionally licensed condominium managers.

When: August 10, 2023, 11 a.m. – Noon

Where: Virtual on Zoom

[Register](#)

Conditional Licensing 2021-2023

As of December 1, 2021, all individuals and companies that provide condominium management services in Alberta must be licensed by RECA. Existing condominium management professionals were required to apply for a conditional licence at that time. **Conditionally licensed condominium manager associates, associate brokers, and brokers must complete the required education, or otherwise meet the conditions on their licence, by September 30, 2023 in order to remain licensed.**

Individuals hoping to become licensed will need to complete the required education through a third-party [recognized course provider](#). Review the information below and then follow the [step-by-step instructions for getting your licence](#).

Read more about [how RECA developed condominium manager licensing](#) and how it's different from property management.

▼ [Graduated Licensing Program](#)

▼ [Graduated and Conditional Licensing FAQs](#)

▼ [Courses](#)

▼ [Exams](#)



Questions



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