



Request For Strata Management Services Proposal

The owners of strata plan, \_\_\_\_\_ are requesting a proposal for management services. The following information includes a summary of our property and the essential services we are seeking. Please contact the strata representative to deliver a proposal package or request an appointment with our strata council.

Once a successful company has been selected, the proposed contract will be requested for the discretion of strata council to seek legal advice on the terms and conditions of the contract.

Strata Council Representative Contact: \_\_\_\_\_ Phone #: \_\_\_\_\_

Location of the Strata Property: Address \_\_\_\_\_ City \_\_\_\_\_

Total number of units: \_\_\_\_\_ Total number of buildings: \_\_\_\_\_

Type of Building

Low-rise \_\_\_\_\_ Townhouse \_\_\_\_\_ High-rise \_\_\_\_\_ Bare-land \_\_\_\_\_
Residential \_\_\_\_\_ Commercial \_\_\_\_\_ Mixed use \_\_\_\_\_
Date of original construction \_\_\_\_\_ First occupancy \_\_\_\_\_
Current management status \_\_\_\_\_

Services we are seeking (check to indicate)

Accounting

Accounts receivable \_\_\_\_\_ Accounts payable \_\_\_\_\_ Monthly financial reports \_\_\_\_\_
Year-end reconciliation \_\_\_\_\_ Investment management \_\_\_\_\_ Collections \_\_\_\_\_
CRF planning \_\_\_\_\_ Annual tax returns \_\_\_\_\_ Audit Preparation \_\_\_\_\_
Banking \_\_\_\_\_

Operations

Service contract supervision \_\_\_\_\_ Employee supervision \_\_\_\_\_ Employee recruitment \_\_\_\_\_
Building inspections & reports \_\_\_\_\_ Maintenance planning \_\_\_\_\_ Emergency response \_\_\_\_\_
Risk management \_\_\_\_\_ Sourcing service providers and contractors \_\_\_\_\_

Governance

Attend monthly meetings \_\_\_\_\_ Attend general meetings \_\_\_\_\_ Minute taking \_\_\_\_\_
Minutes distribution \_\_\_\_\_ Prepare notice of general meetings \_\_\_\_\_
Correspondence \_\_\_\_\_ Registration at general meetings \_\_\_\_\_
Record keeping \_\_\_\_\_ Privacy officer \_\_\_\_\_

Additional information: \_\_\_\_\_
\_\_\_\_\_
\_\_\_\_\_

For more information on CHOA resources and benefits visit www.choa.bc.ca or contact the office at 1-877-353-2462 or email office@choa.bc.ca.

No part of this publication may be reproduced without the prior written permission of CHOA

This publication contains general information only and is not intended as legal advice. Use of this publication is at your own risk. CHOA will not be liable to you or any other person for any loss or damage arising from, connected with or relating to the use of this publication or any information contained herein by you or any other person.