



ESSENTIAL ASSET MANAGEMENT TOOLS

R**D****H**

This Presentation Is Adapted From:

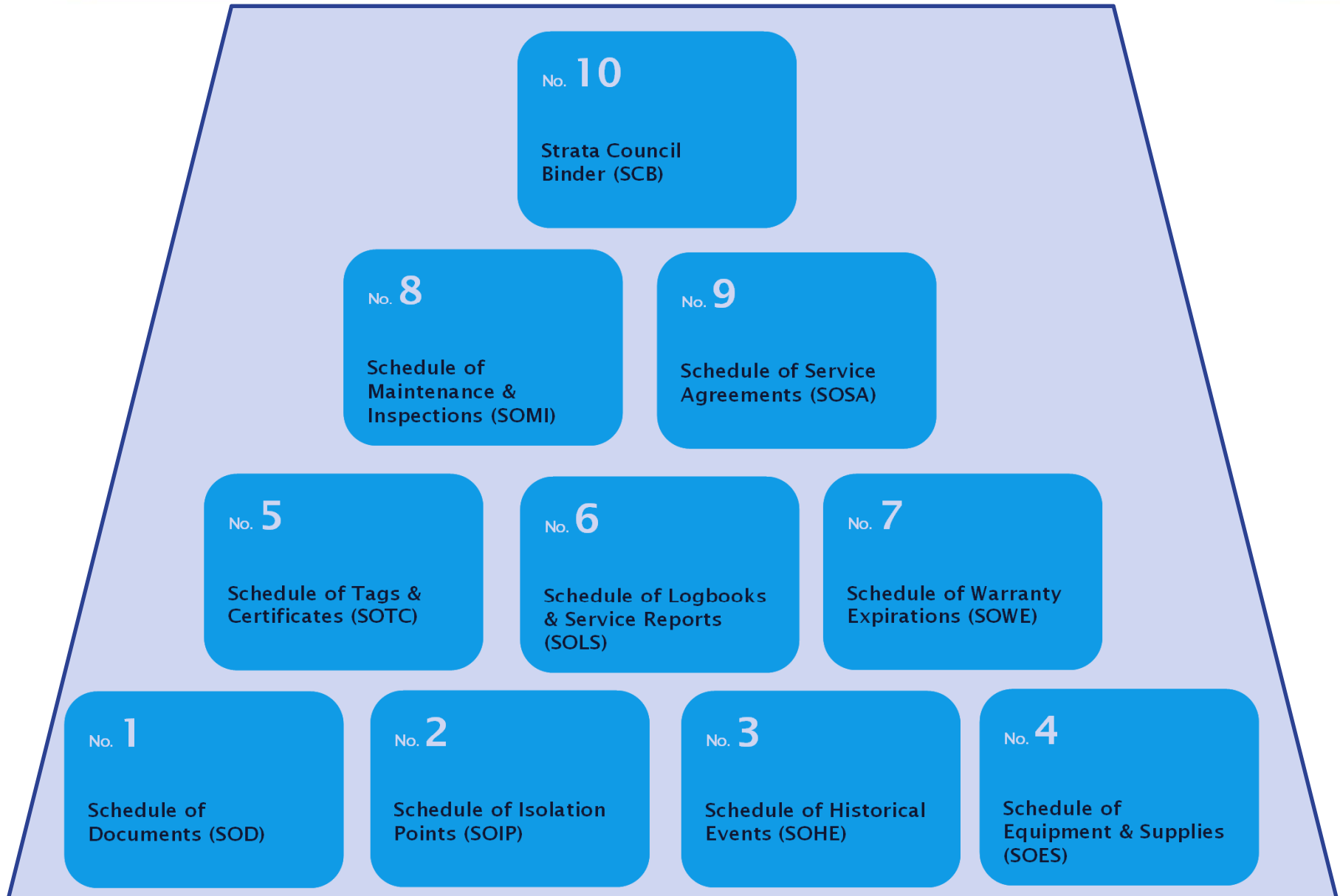


Downloadable from:
<http://learning.rdh.com/workbook>

A Reminder – What Are You Managing

System	Sample Assets
Enclosure	Roofs, windows, balconies, doors, etc.
Electrical	Electrical distribution, lighting, enterphone, etc.
Mechanical	Plumbing, drainage, ventilation, etc.
Elevator	Elevator machine, cabs, etc.
Fire Safety	Detection, suppression, egress, etc.
Interior Finishes	Flooring, painting, doors, etc.
Amenities	Furnishings, fitness equipment etc.
Sitework	Sanitary & storm sewers, water lines, landscaping, paving, etc.

The Asset Management Tool Box



Every Tool Has A Template In The Workbook

No. 4

Schedule of Equipment & Supplies (SOES)

No. 4
Schedule of Equipment & Supplies (SOES)

No. 9

Schedule of Service Agreements (SOSA)

No. 1
Schedule of Service Agreements (SOSA)

No. 10

Schedule of Documents (SODO)

A.	Governance	Location of Master Document	Number of Pages	Scanned	Date of issue	Notes	Entered by:
						Planning a review in early 2014	DA

Strata Number: _____
 Date: _____

Strata Number: _____
 Date: _____

A.	Equipment	Quantity	Storage location	Notes	Entered by:
Example	12 foot ladder	x1	Storage shed	The ladder must be signed out	DA
1					
2					
3					
4					

B.	Supplies	Quantity	Storage location	Notes	Entered by:
Example	Fan filters	1 box	Mechanical room	12"x16" filters, non-washable, purchased from ABC Supplies	DA
1					
2					
3					
4					
5					

C.	Other	Quantity	Storage location	Notes	Entered by:
1					
2					
3					

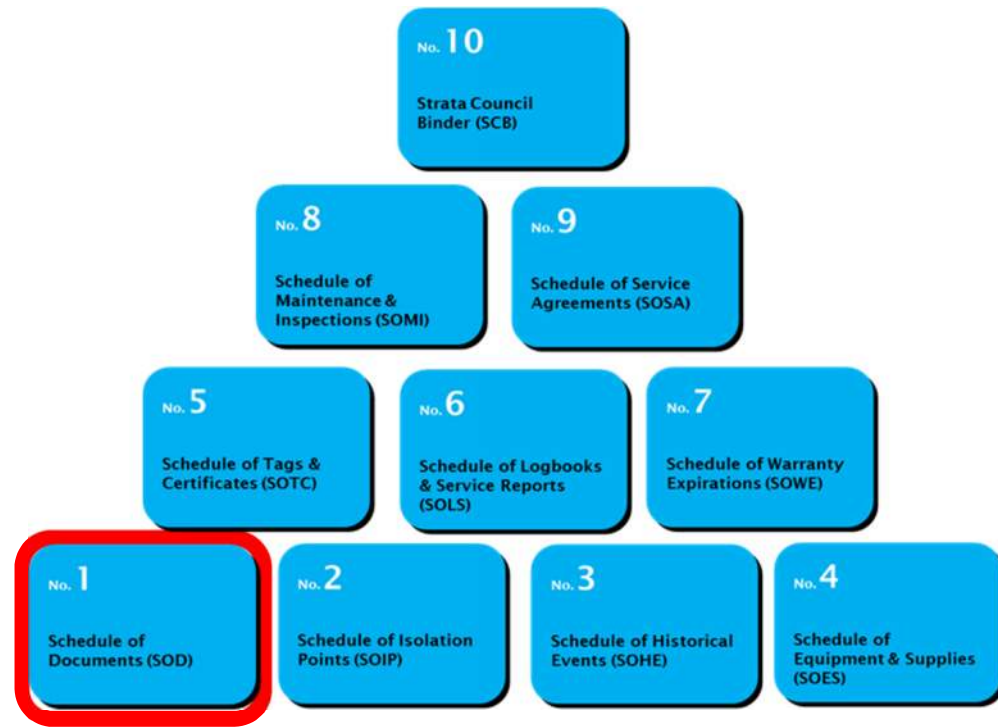
Strata Number: _____
 Date: _____

Strata Number: _____
 Date: _____

Strata Number: _____
 Date: _____

Strata Number: _____
 Date: _____

Schedule Of Documents (SOD)



Examples Of Governance Documents

Disclosure Statement

DISCLOSURE STATEMENT
FEBRUARY 24, 1995
REAL ESTATE ACT OF BRITISH COLUMBIA

This is a Disclosure Statement with respect to an offering by Molnar Capital III Inc. (the "Developer") for the sale of certain lots located at 2654-2686 West 4th Avenue, Vancouver, British Columbia in a development known as the "Star of Kitsilano" (the "Development")

DEVELOPER

Name:

Registered Office:

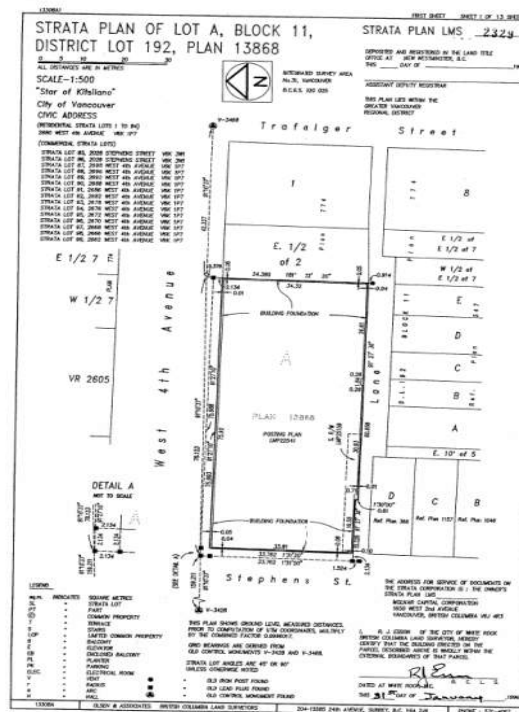
Mailing Address:

DISCLAIMER

NEITHER THE SUPERINTENDENT OF REAL ESTATE NOR ANY OTHER AUTHORITY OF THE GOVERNMENT OF THE PROVINCE OF BRITISH COLUMBIA HAS IN ANY WAY PASSED ON THE MERITS OF THE MATTERS DEALT WITH IN THIS DISCLOSURE STATEMENT. THIS DISCLOSURE STATEMENT HAS BEEN FILED WITH THE SUPERINTENDENT OF REAL ESTATE, BUT HE HAS NOT DETERMINED WHETHER OR NOT IT COMPLIES WITH PART 2 OF THE REAL ESTATE ACT.

- Developer's intentions
- Caveat emptor for buyer
- 1st year operating budget
- 1st year reserve allocation
- 1st year management company

Strata Plan



- Who owns what?
- How much does each own?

Bylaws

STRATA CORPORATION LMS

Surrey, B.C. V3V 1V2

BYLAWS
Approved September 14, 2011

RULES
Ratified August 25, 2010

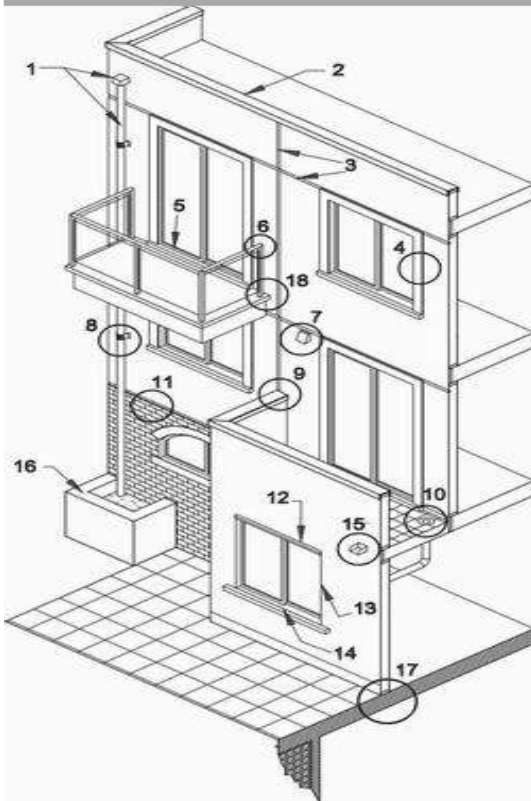
These Bylaws are for the protection of your investment and your living comfort at La Costa Green and can be reviewed at a properly convened General Meeting of the Owners of Strata Corporation LMS 1425

Bylaws to remain with suite when sold

- Strata responsibilities
- Owner responsibilities

Examples Of Technical Documents

Drawings



Architectural, structural, mechanical, electrical, civil, etcetera...

Manufacturer Literature



Pumps, fans, motors, boilers, panelboards, transformers, etcetera...

Consultant Reports

1. Introduction	
2. Evaluation of Assets	
2.2. Physical Assessment	
2.3. Financial Assessment	
3. Major Maintenance and Repairs	
3.1. Maintenance	
3.2. Renewals Program	
4. Project Planning	
4.1. "Strategic"	
4.2. "Tactical"	
4.3. "Operational"	
4.4. Project	
5. Funding Scenarios	
5.1. Alternative	
5.2. Funding by Individual Owners (Status Quo)	
5.3. Funding by Individual Owners	
5.4. Funding by Individual Owners	
5.5. Funding by Individual Owners	
6. Recommendations	

Warranty reviews, depreciation report, condition assessment, etc...

RDH

Income		
Operating Income	3000-0000	343,015.00
Contingency Reserve Income	3010-0000	34,301.00
Interest Income	3030-0000	400.00
		<u>377,716.00</u>
 Expense		
Agent Fee	4000-0000	36,506.40
Legal/Consulting Fees	4010-0000	10,050.00
Photocopying/Postage	4012-0000	2,875.00
Mgmt Office Supplies & Expenses	4013-0000	1,000.00
Bank Charges	4015-0000	216.00
Insurance	4040-0000	65,635.00
Electricity	4050-0000	4,500.00
Water & Sewer	4052-0000	79,000.00
Garbage Collection	4056-0000	34,000.00
Repairs & Maintenance - General	4160-0000	15,559.20
Supplies	4217-0000	300.00
Window Cleaning	4220-0000	3,000.00
Pest Control	4222-0000	5,000.00
Gutter Cleaning	4223-0000	7,900.00
Dryer Vent Cleaning	4225-0000	1,800.00
Janitorial	4232-0000	720.00
Landscaping	4300-0000	69,353.40
Landscaping Improvement/Planting	4300-0020	3,000.00
Snow Removal	4310-0000	2,000.00
Irrigation System	4315-0000	1,000.00
		<u>343,415.00</u>
 Surplus (deficit) from operations		
Contingency Reserve Transfer	4800-0000	34,301.00
		<u>34,301.00</u>
Total operating surplus (deficit)		0.00

Balance Sheet (Accrual)
February 2012

Assets	
Current Assets	
Cash	
Bank - Operating Account	158,477.67
Bank - Contingency Reserve	250,005.24
Bank - Other Reserves	65,458.40
Total Cash	473,941.31
Accounts Receivable	21,736.92
Accounts Receivable - Others	353.85
Due From / (To) Developer	669.44
Total Current Assets	496,701.52
Fixed Assets	
Caretaker's Suite	322,568.35
Total Fixed Asset	322,568.35
Total Assets	819,269.87
Liabilities & Equity	
Liabilities	
Accounts Payable	63,738.76
Accrued Payable	52,685.60
Prepayment - Revenue	4,614.48
Security Deposit Received	450.00
1st Mortgage	225,468.75
2nd Mortgage	76,920.95
Total Liabilities	423,878.54
Equity	
Caretaker's Suite Equity	20,178.65
Operating Surplus(Deficit)	59,749.04
Contingency Fund Balance	250,005.24
Reserve-Mortgage	65,458.40
Total Equity	395,391.33
Total Liabilities & Equity	819,269.87

Insurance Certificate

COASTAL INSURANCE SERVICES LTD.

101, 110 Broadview Park, Westside, BC V6V 0H3 Tel: 604.673.1700 Fax: 604.673.274
132 Johnson Road, Port Moody, BC V8H 3P7 Tel: 604.331.0229 Fax: 604.331.2021
Toll Free: 1-800-665-2110 Website: www.coastalinsuranceservices.com - a full service insurance company

1982-2008

Policy No. CMW 2676

DECLARATIONS

Name of Insured: The Owners of Strata Plan NW 2676 Colong Bay

Location: 7451, 7453, 7455, 7457 & 7459 Midway, Richmond, BC V6V 1X9

Additional Named Insured: The Wyntleyn Group Ltd., 1200 West 2nd Avenue, Vancouver, BC V6P 4G5

Policy Period: 12/31/11 to 12/31/12 (monthly) 12/01 as the Standard Time

Loss Payable to: The Insured and/or in Accordance with the Strata Property Act of British Columbia

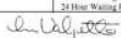
Insurers: As Per List of Participating Insurers Attached

Insurance is provided subject to the Declarations, Terms, Conditions, Limitations and Endorsements of this policy and only for those coverages for which specific limits or amounts of insurance are shown on this Declaration Page.

INSURING AGREEMENTS

	Deductibles (\$)	Limits (\$)
PROPERTY - STR (05/01)		
All Property, Other Structures, Unattached Replacement Cost, Bylaws	2,500	27,000.00
Water Damage	25,000	Includes
Backup of Sewers, Sumps, Septic Tanks or Drains	25,000	Includes
Earthquake Damage	15%	Includes
Flood Damage	25,000	Includes
Key & Lock Replacement	10,000	250
BLANKET EXTERIOR GLASS - Form 820000 (02/06)	Residential	100
COMMERCIAL GENERAL LIABILITY - Form 001002 - 10 (04/01)		
Coverage A - Bodily Injury & Property Damage Liability - Per Occurrence		500
General Aggregate Limit		500
Products & Completed Operations - Per Occurrence		500
General Aggregate Limit		500
Coverage B - Personal & Advertising Injury Liability - Per Occurrence		500
General Aggregate Limit - Aggregate		500
Coverage C - Medical Payments - As per Previous		
Medical Payments - Per Occurrence		25.00
Coverage D - Transit Legal Liability		500
Non-Owned Automobiles - SEP as Form 735002 - 02 Per Occurrence		10,000.00
Contractual Liability - SEP #66 From 335150 - 05 Per Occurrence		10,000.00
Including Long Term Lease Vehicle - S.E.P. No. 99 From 335300 - 02 Per Occurrence		10,000.00
Automotive - Automobile Exclusion - Form 223654 - 01 - Aggregate		10,000.00
Limited Pollution Liability Coverage - Form 000114 - 02 - Aggregate		1,000.00
Environmental Liability - Form 000019 - 05 - Aggregate		1,000.00
DIRT TOOLS & OFFSHORE LIABILITY - Form G42 (05/09)		1,000
Construction Discrimination Defense Costs - Per Occurrence		25.00
Advertising		1,000.00
POLLUTION & REMEDIATION LEGAL LIABILITY - Form XLCE-PA-RCLP-CM10 10 (01/11)		10,000
Pollution Liability - Earth Loss, Remediation Expense & Legal Defense Expense		Retention
VOLUNTEER ACCIDENT - Policy # 92254104 (05/06) - Part II		
Principal Sum - \$100,000 Weekly Accident Indemnity - \$500 (max 1000 52 weeks)		7 Day Waiting Period
Accident Expenses - amounts up to \$10,000 (see policy wording) (Form 05300)		100,000.00
COMPREHENSIVE FIRE INSURANCE, REINSURANCE AND DISTRIBUTION - Form 500000 (01/00)		
Employee Dishonesty - Form A		10,000
Loss Outside the Premises		5,000
Loss Outside the Premises		5,000
Money Orders and Counterfeit Paper Currency		5,000
Deposition Funds		5,000
EQUIPMENT BREAKDOWNS		
Physical Damage - Fire, Damage, Standard Comprehensive Plus, Replacement Cost - Form 8740014 (01/11)	1,000	27,000.00
Consequential Damage - Form 79013 (01/11)	1,000	25,000
Extra Expense - Form 003033 (01/11)		24 Hour Waiting Period
Ordinary Expense - 30 Days - Form 8740014 (05/11)		24 Hour Waiting Period

ALL COVERAGES SUBJECT TO POLICY DEFINITIONS
This Policy contains a clause(s), which may limit the amount payable.
This policy shall not be valid or binding unless countersigned by a duly Authorized Representative of the Insurer.


President
Coastal Insurance Services Ltd.

Income and expenses

Assets and liabilities

Coverages and deductibles

Examples Of Legal Documents

Service Agreements

Honeywell

**Home and Building Control
Building Services**

Please Initial Below
Honeywell: *[Signature]*
Client: *[Signature]*

Proposal Number: 57428D
Date: July 23, 2001
Agreement Number: _____

By and between:
Honeywell Limited - Honeywell Limited (Honeywell)
Suite 300
2450 Gardner Court
Burnaby, BC V5G 3K4
Services will be provided at the following location(s):
Europe
63 Keefer Place
Vancouver, BC
System Type
☐ Temperature Control System
☐ Mechanical System
☐ Building Automation System
☐ Security System
☐ Fire Alarm System
☐ Comprehensive Preventative Maintenance
☒ Mechanical Maintenance Summary
☒ Preventative Maintenance Coverage
☒ Honeywell Service Commitments
☒ Air Filter Service
☒ Maintained Equipment List
☐ Multi-Year

The Owner's Strata Plan LMS 4671
West (Client)
C/O Kyle Properties Ltd.
Suite 105, 1537 West 8th Avenue
Vancouver, BC V6J 1T5
by its Agent

Coverage

Honeywell has provided our new guaranteed service commitment as part of your maintenance agreement with us. This means that you are entitled to guaranteed emergency response performance of repairs and our guarantee that we will perform your preventative maintenance in a timely manner. ☐ Not Applicable ☒ Included

The first year maintenance service price \$ Six Thousand Eight Hundred and Eighty Eight (\$1,722.00 Quarterly) _____ dollars (\$ 6,888.00)
plus applicable taxes, shall be ☒ Quarterly ☐ Semi Annual ☐ Annual, in advance.
Method of payment shall be ☐ Electronic ☒ Invoiced.
Service shall commence on August 1, 2001
Maintenance Service Agreement term: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☒ 5 ☐ 6 Years

This proposal and the pages attached shall become an agreement only upon signature below in space titled "Approved for Honeywell" and upon endorsement of credit approval by Honeywell. No waiver or modification of any terms or conditions on this agreement shall be binding on Honeywell unless made in writing and signed by an authorized manager of Honeywell.
Honeywell: *[Signature]* LMS4071
By: *[Signature]*
Signature: *[Signature]*
Service Account Specialist
Title: *[Signature]*
Approved for Honeywell
By: *[Signature]*
Signature: *[Signature]*
District Service Leader
Title: *[Signature]*
On-Site, On Time, As Promised - Guaranteed!

Page 1 of 11

Warranties

WARRANTY NUMBER: 4798001266

15 YEAR PLATINUM WARRANTY

SOPREMA

Name and address of owner:
1565 180
100 West 17th Avenue
Vancouver, BC V6M 1B5
Name and address of contractor:
SOPREMA INC.
1111 Oxford Street
Coquitlam, BC V3R 4C2
Name and address of project:
Dunbar Park Phase II
1616 West 17th Avenue
Vancouver, BC

Installation
Name:
Date installed:
17th Aug. 8
September 13, 2001
Significance:
Roof sheet field joint:
Cap sheet field joint:
Roof sheet flashings:
Cap sheet flashings:

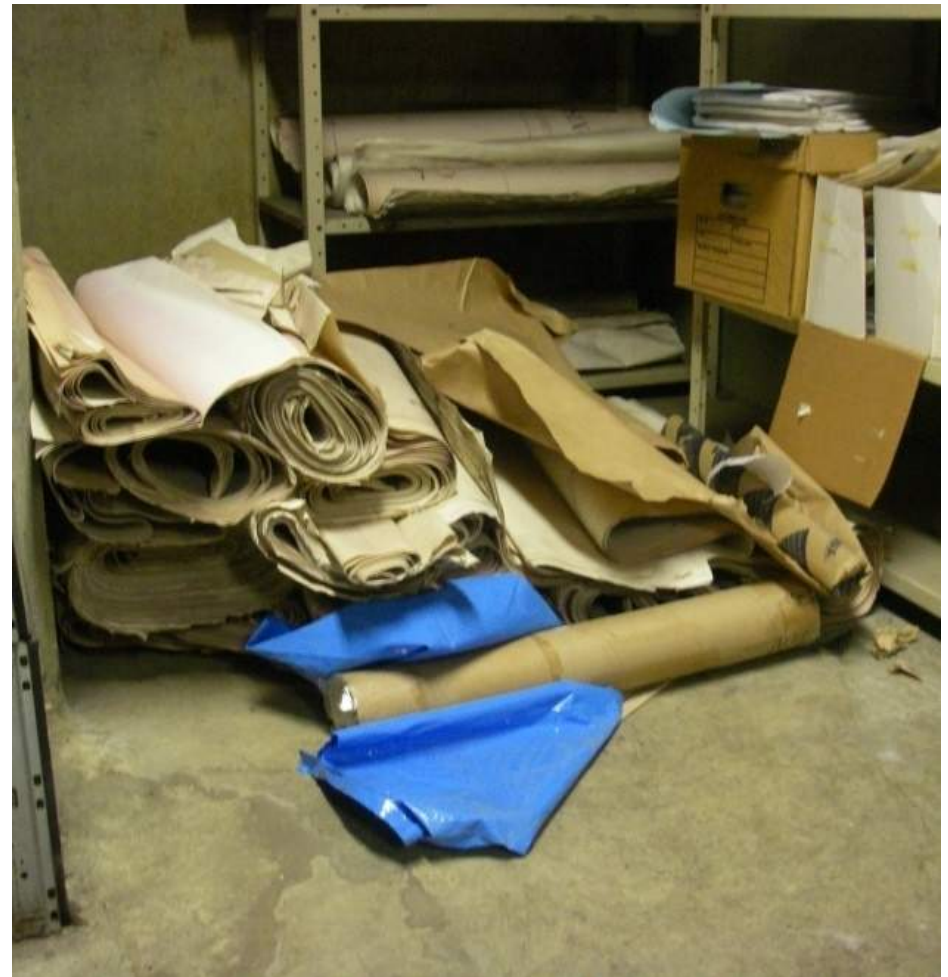
SOPREMA INC., a legally constituted corporation with its registered office at 1640 rue Haggerty, Drummondville (Québec) J2C 5P8, warrants, to the above referenced owner, that Soprema will repair any leaks in the roofing membrane for the above-referenced building and roof area during the warranty period indicated above, beginning at the issue date of the warranty or at the date of substantial completion if applicable, subject to the LIMITATIONS and CONDITIONS set forth hereunder.

LIMITATIONS AND CONDITIONS

- In the event that manufacturing defects or deficiencies in the materials furnished or approved by SOPREMA INC. or an application defect by the approved roofing contractor which causes water infiltration to occur, and provided that the materials in question were installed in strict compliance with current published standards, instructions and specifications prepared by SOPREMA INC., SOPREMA INC. undertakes, for the duration of this warranty, to make all necessary repairs to restore the roofing system to dry and watertight condition. The liability of SOPREMA INC. hereunder shall be limited to the cost of materials and labour to restore the roofing assembly and membrane to a dry and watertight condition and shall, under no circumstances, include the replacement of an existing roof assembly in the case of a re-cover (Platinum Conditions), any direct, indirect or consequential damages of any kind other than damage to the roof. Specifically, SOPREMA INC. shall not be liable for loss of use of the building or the equipment or contents therein, loss profits due to production stoppages or any other type of harm whatsoever and without restriction caused to the owner, the users and/or any clients.
- With the exception of a Sopremaan green roof system, ballast, filter fabric and insulation for ballasted and inverted roof systems, the owner shall, at his own expense, do all necessary work in order to eliminate any overburden caused by, but not limited to, shafts, plants, appliances, partitions, concrete piers and concrete covering, the membrane to be removed and if desired, subsequently replaced in order that SOPREMA INC. can conduct its repairs.
- In the event that materials covered by the warranty are no longer available, SOPREMA INC. reserves the right to supply other materials compatible with the work to be performed.
- This warranty shall only be in effect if SOPREMA INC. has been paid in full for all warranty charges and materials supplied for installation on the above-referenced building.
- Subject to the other terms and conditions of this warranty and without limiting the generality thereof, SOPREMA INC. shall not be held liable on the event of: a) Abuse or abnormal use of the materials supplied by SOPREMA INC., such as excessive traffic on the roof, use as a storage area, storage or stockpiling of materials or objects on SOPREMA INC. membrane; b) Improper building design or construction; c) Inefficient ventilation of the attic in buildings with vented attics; d) Alterations, transformations, additions or repairs to the roof after the above referenced date without prior written authorization from SOPREMA INC.; e) Damage from falling objects regardless of source; f) Acts of God including but not limited to war, rioting, acts of terrorism and natural catastrophes, including but not limited to flooding, lightning, hail, conflagration and vandalism; g) Movement or deterioration of a material adjacent to and/or incorporated into materials used as a detail or subdetail for the membrane, or any defects in the building structure or abnormal movement thereof; h) Inadequate maintenance of the roof or failure to exercise reasonable care.
- During the warranty period, SOPREMA INC. agents or employees must have free access to the roof at all times during regular business hours as may be required.
- This warranty may be transferred to subsequent owners of the building provided written notice is sent to SOPREMA INC. at the above-referenced address within THIRTY (30) days of change of ownership, failing which the warranty shall be null and void.
- The warranty holder's recourse as described herein is the sole and exclusive recourse in the event of a claim under this warranty or a claim in any way related to the membrane, and excludes all other types of claims, including for regular wear, changed appearance or variation in colour or tone.
- In the event of dispute over interpretation or enforcement of this warranty, the court jurisdiction for dispute settlement shall be that of the province in which the building is located and in the city in which SOPREMA INC. has its closest registered office. In the event that SOPREMA INC. has no registered office in the province, the city shall be that in which the building is located.
- The owner is presumed to have understood the nature and scope of each clause of this warranty unless explanation was asked in writing of SOPREMA INC. within TEN (10) days of the issuance date.
- In the event a risk occurs during the warranty period, the warranty holder must notify SOPREMA INC. in writing at the above-referenced address in the situation of the Warranty Agent, Soprema Technical Organisation, within EIGHT (8) days of the discovery of the leakage.

No agent, regular representative or employee of SOPREMA INC. is authorized to alter this warranty in any way whatsoever. No warranties or obligations, whether express or implied and whether of a legal nature or not, shall extend the scope of the present warranty. In the event an individual term or provision of this warranty is declared null and void by a Court, the other terms and provisions of the warranty shall remain their full force and effect and not be invalidated in any way.

How To Store Documents - This Is Wrong...



How To Store Documents – This Is Right

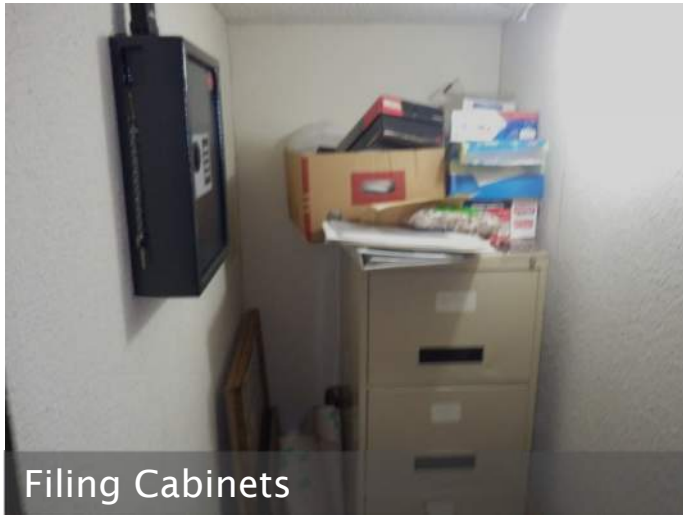


Hardcopy Documents



Digitized/Electronic Documents

How To Store Documents – This Is Right



Filing Cabinets



Binders



Bookshelves



Computerized Systems

Why Do You Need A SOD..?



→ Stewardship

- If we cannot manage our documents we cannot manage our physical assets.
- Our documents are also an “asset” – they are an intellectual asset.

→ Liability

- Strata corporations need documents for responsible stewardship.
- When something goes wrong, the first thing people look for are the documents.
- The average strata corporation has 1,000+ pages of reference documents handed over after construction. Or at least it should have.

→ Cost Effectiveness

- It is very expensive to replace missing or damaged documents. Unfortunately, some documents can never be replaced.

→ Efficient Operations

- The Schedule of Documents is like the Table of Contents at the front of a book and the index at the back of a book.

Template For A SOD



No. 1

Schedule of Documents (SOD)

Strata Number: _____

Date: _____

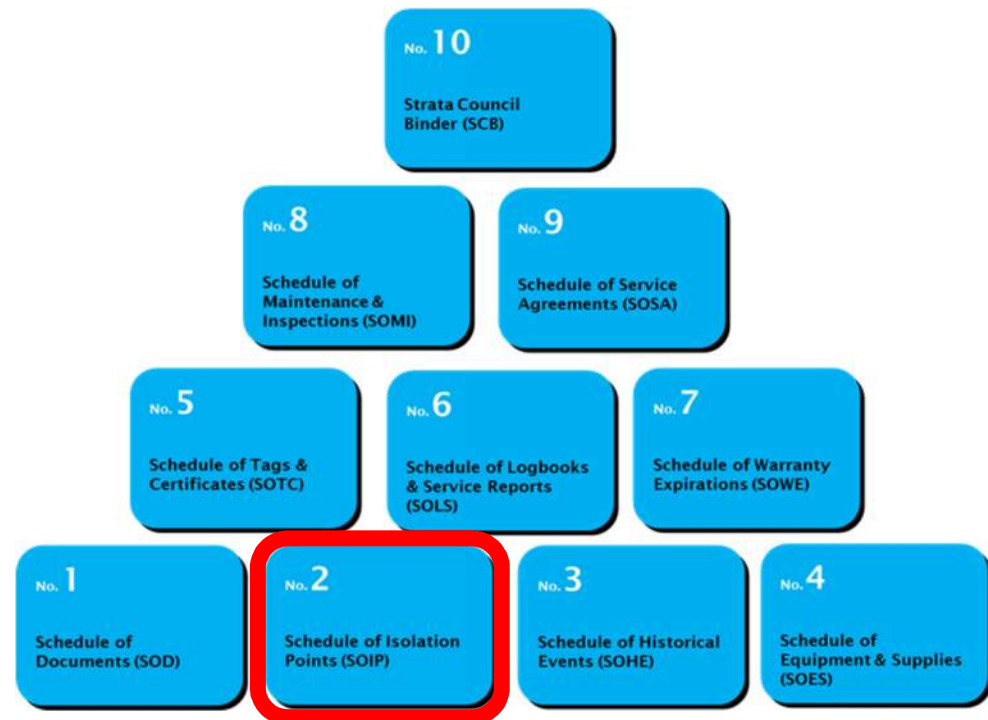
B.	Technical Documents	Location of Master Copy	Number of Pages	Scanned	Date of issue
Example	Drawings, arch.	Council meeting room	12	no	1991

1	Drawings, architectural				
2	Drawings, structural				
3	Drawings, electrical				
4	Drawings, mechanical				
5	Drawings, plumbing				

4	Drawings, mechanical					
5	Drawings, plumbing					
6	Drawings, other					
7	Investigation					

C.	Financial Documents	Location of Master Copy	Number of Pages	Scanned	Date of issue	Notes	Entered by:
1	Operating budget						

Schedule Of Isolation Points (SOIP)



What Is An Isolation Point..?

→ Anything that shuts off the flow of fluids, gases, or electrical.



Domestic Water Valves



Electricity



Irrigation Sprinkler Valves



Fire Sprinkler Valves



Steam Valves



Gas Regulators

Why Do You Need A SOHI - Here's A Short Story... RDH

- A pipe burst in one of the suites.
- Water was flooding into the suite and running down into the floors below.
- Owners were in a panic. Nobody knew how or where to turn off the water.
- When they finally found the valve, it was seized. It would not fully close as it had not been maintained for over 20 years.
- Water flooded into the suites below and into the elevator shaft.
- Many, many thousands of dollars of damage could have been prevented had there been a valve chart in the building.

Why Is A SOIP Important..?



→ **Safety:**

- Some equipment cannot be safely worked on without shutdown.
- For example: de-energized service of an electrical sub-station.

→ **Emergencies:**

- Expedient shutdowns are necessary to limit collateral damage.
- Example: water escape from a burst pipe.

→ **Maintenance:**

- Some equipment must be shutdown on a seasonal basis.
- Example: hose bib winterization every year.
- Winterization of our irrigation sprinkler system.
- Maintenance – we need to shut off equipment to purge, flush and scope.

→ **Repairs & Renewals:**

- Isolation of equipment is necessary for repairs and renewals.
- Repairs – we need to shut things off to fix them.

RDH



Mounted on the wall in a conspicuous location

Template For A SOIP

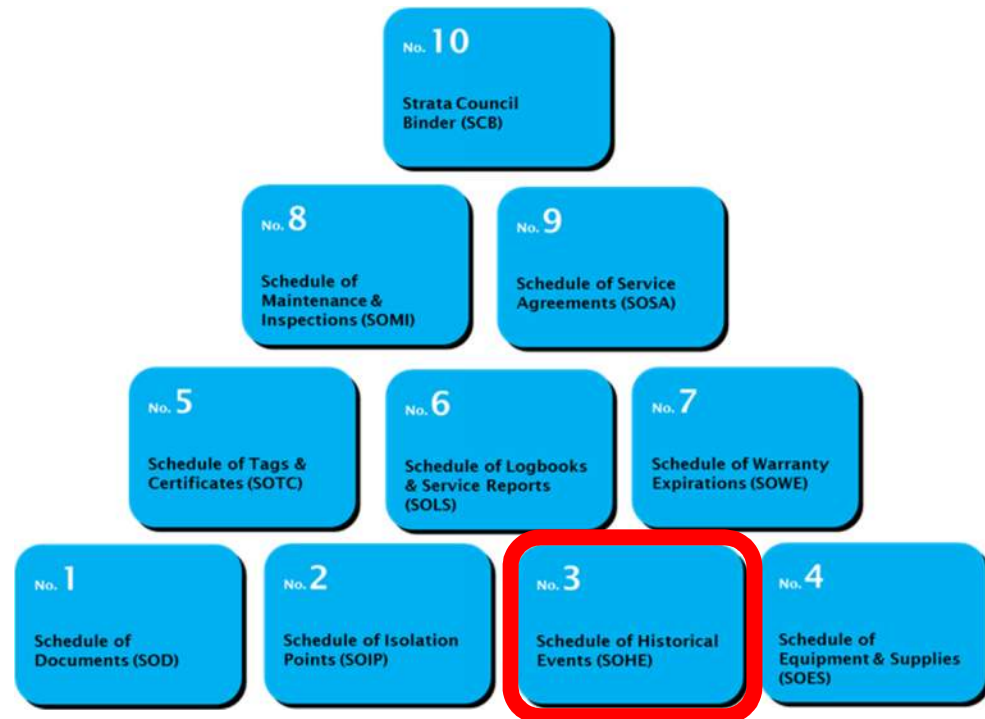
No. 2

Schedule of Isolation Points (SOIP)

A. Domestic Water		Location	Notes	
Example	Main shut off valve	P1 mech room beside stall #15		The door to the
1	Main water shut off valve			
2	Irrigation sprinkler			
3	Hosebibbs			This is essenti
4	Valve chart			
5				
B. Irrigation Water		Location(s)	Notes	
1	Main shut off valve			
2	Zone controller			
3				
C. Electricity		Location(s)	Notes	
1	Main disconnect switch			Must call BCH
2	Single line diagram			
3	Pad mounted transformer			
4	Distribution transformers			
D. Gas		Location	Notes	
1	Main shutoff			Must call Ter
2	Gas regulators			

A. Domestic Water		Entered by:
Example	Main shut off valve	DA
1	Main water shut off valve	
2	Irrigation sprinkler	
3	Hosebibbs	
4	Valve chart	
5		
B. Irrigation Water		Entered by:
1	Main shut off valve	
2	Zone controller	
3		
C. Electricity		Entered by:
1	Main disconnect switch	
2	Single line diagram	
3	Pad mounted transformer	
4	Distribution transformers	
D. Gas		Entered by:
1	Main shutoff	
2	Gas regulators	

Schedule Of Historical Events (SOHE)



What Is A SOHE..?



- A brief itemized summary of historical events.
- The summary can be organized by date, location, system, etc.
- Examples of historical events:
 - Large projects (eg. roof replacement).
 - Insurance losses (eg., flood at unit 307).
 - New bylaws (eg., patio/balcony alterations).
 - Warranty claims.

Why Is A SOHE Important..?



→ **Your Identity**

- Every strata has a corporate memory that needs to be preserved.
- A strata without a memory is a strata without knowledge.

→ **Transient Ownership**

- Councils change every year.
- Property managers change.

→ **Your Future**

- Where you have been is just as important as where you are going.
- History has a tendency to repeat itself.

Where Can You Find Historical Information..?



- Minutes of council meetings.
- Minutes of general meeting.
- Insurance claim histories.
- General ledger printouts.
- Original owners and knowledgeable owners.
- Former council members.
- Former committee members.

An Example From A Strata Corporation...

2007-05-12 CHANGERS FILTERS ROOF	2012-08-04 FILTERS ON ROOF
7/6/09 FILT ROOF	2012-08-04 DRIVE IN SEALED
2009-08-17 CLEANED BOILER RM FRESH AIR INTAKE VENT	2012-08-04 NEW VALVES IN SPRINKLER RM
2009-08-23 CHANGERS FILTERS ON ROOF	2012-09-04 FILTERS ON ROOF
2009-11-17 2 NEW SUMP PUMPS	FILTERS ON ROOF
2009-12-23 ALL LOWER DRAINS CLEANED/EMPTYED	2012-11-07 UPPER "P" WASHED
2010-03-02 UPPER P MOVED DOWN LOWER	2013-02-20 LOWER "P" WASHED
2010-03-04 FRONT ENT. POWER WASHED	2013-02-21
*2010-03-18 NEW ROOF DOOR HARDWARE	2013-05-28 NEW FILTERS ON ROOF
2010-05-10 FILTERS ON ROOF	2012-12 NEW EMERGENCY EXIT SIGNS
2010-05-12 SNAKE FROM RF 103/306/313 103/307 316	PAINT CEILING ON 4TH NEW EXIT "X"
2010-07-06 NEW FILTERS	2013-03
2010-10-02 NEW FILTERS	2013-04-16 HALLOWAY NEW SHUTOFF VALVES #1-2 & 4
	2013-07-31 FILTERS ON ROOF

Another Example From A Strata Corporation...

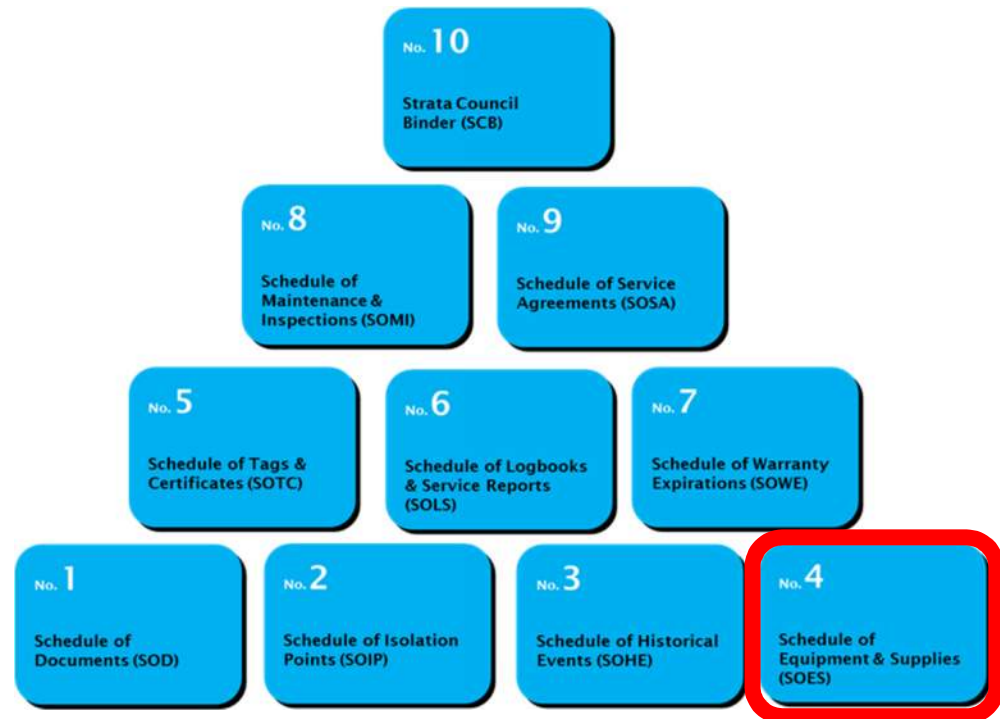


Summary of Completed Projects – Listed by System	
Enclosure System	Fire System
→ Injection crack repairs at the underside of the <u>parkade</u> (pre-2007)	→ Retrofitted fire alarm panel (2010/2011)
→ Replaced sloped asphalt shingle roofs (2006)	→ Replaced deficient alarm bell and smoke detectors (2011)
→ Replaced low-slope SBS roofs (2006)	

- Injection crack repairs at the underside of the parkade (pre-2007)
- Replaced sloped asphalt shingle roofs (2006)
- Replaced low-slope SBS roofs (2006)
- Replaced gutters and rainwater leaders (2010)
- Rehabilitation of building envelope (2010)

→ Hydro flushing of horizontal drain lines (every 2 years)	→ Repainted interior common area walls (2011)
	→ Installed new fire lane signage (2011)
	→ Installed security hardware on common area doors
Electrical System	Sitework
→ Installed software upgrade to <u>enterphone</u> panel (2009)	→ Improvements to soft landscaping coordinated building enclosure renewal (2010)

Schedule Of Equipment & Supplies (SOES)



Examples Of Strata Stock Rooms



Types Of Maintenance Supplies



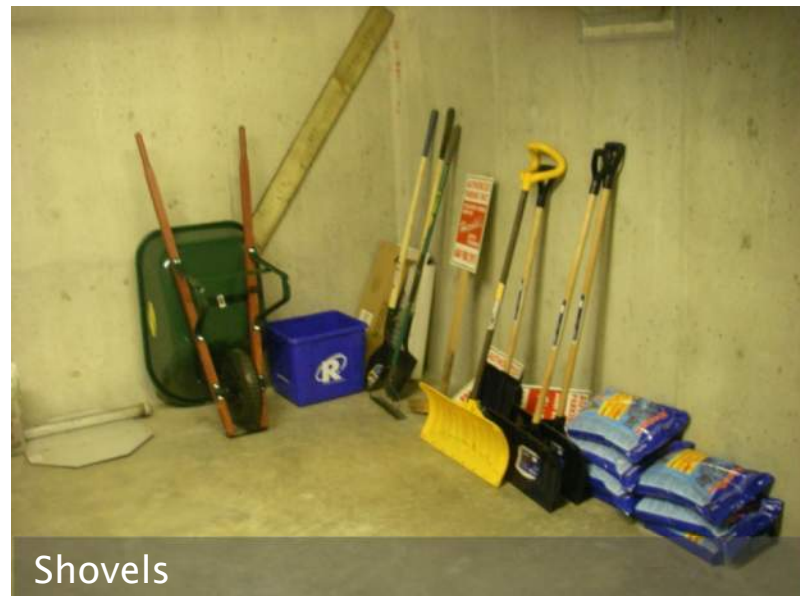
Painting supplies



Floor polisher



Lamps and ballasts



Shovels

Why Is A SOES Important..?



→ **Save Money**

- Avoid the last minute premiums charged by contractors when emergency repairs are carried out.
- Buy products in quantity to get reduced pricing.

→ **Emergency Preparedness**

- Having salt for safety purposes during the winter to avoid slip and fall claims.

→ **Obsolescence Management**

- Matching dye lots for aesthetic assets such as tiles and carpets.

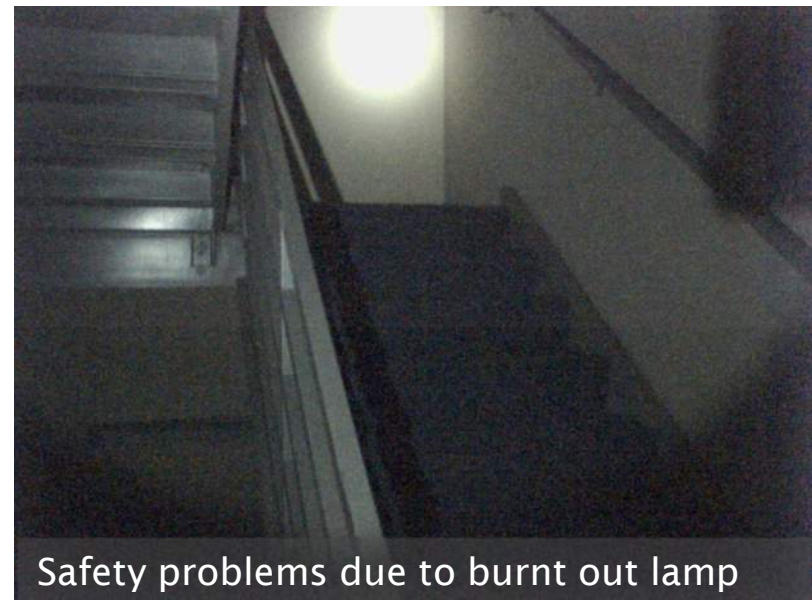
→ **Safety**

- Burnt out lamp in a stairwell poses a safety hazard.

→ **Efficient Access**

- Efficient and safe access to assets.

The Importance Of Equipment And Supplies



Example Of A Strata Sign Out Sheet

Fence Painting Project Materials Sign Out Sheet

Date	Unit #	Name/ Signature	# Gallons	Brushes Yes / No	Approx amount Returned (paint/brushes)	Signature project Coordinator
		(COMMON)				
Aug 10	7	ARCH AT ENHANCE	2	1		PK
Aug 11	25	Kathryn Bratche				
Aug 11	19		2	1		PK
Aug 12	67	DEREK	1	1		PK
Aug 13	51		1	2		PK
Aug 16	43	ALFRED	1	1		PK
Aug 21	66	GREG	2	—	—	PK
Aug 22	28	JUSTIN	2	2		PK
Aug 24	2		2	1	—	PK
Aug 25	17	LORETA	1	1	—	PK
Aug 26	24	JASON	1	1		PK
Aug 30	21	NEIL BAKER	1	1		

Example Of A Strata Key Log

Common area key list.

- # 1. 1st floor electrical / meter / Telephone room
- # 2. 1st floor E. side door alarm.
- # 3. Upper parkade electrical / timer room.
- # 4. Boiler room.
- # 5. Sprinkler room.
- # 6. Elevator room.
- # 7. File room / office.
- # 8. Mail box key.
- # 9. Laundry coin drawers.
- # 10. Strata locker.
- # 11. Garbage padlock.
- # 12. Garage side door.
- # 13. The two locks on the enterphone.
- # 14. Elevator key.
- # 15. Fire extinguishers boxes in hallways.
- # 16. Alarm panel.
- # 17. Filing cabinet.
- # 18. Lock on sprinkler valve.
- # 19. Gate on the E. side.
- # 20. Pass key for # 1, 3, 4, 5 and 6.
- # 21. Padlocks on roof hatches

Building keys, front entrance: cylinder replaced on 2009 11 24
Roof hatches and 4th fl hardware installed on 2010 03 24
Old key # 95
New keys # 103 to 212 inc.

Template For A SOES



No. 4

Schedule of Equipment & Supplies (SOES)

Strata Number: _____

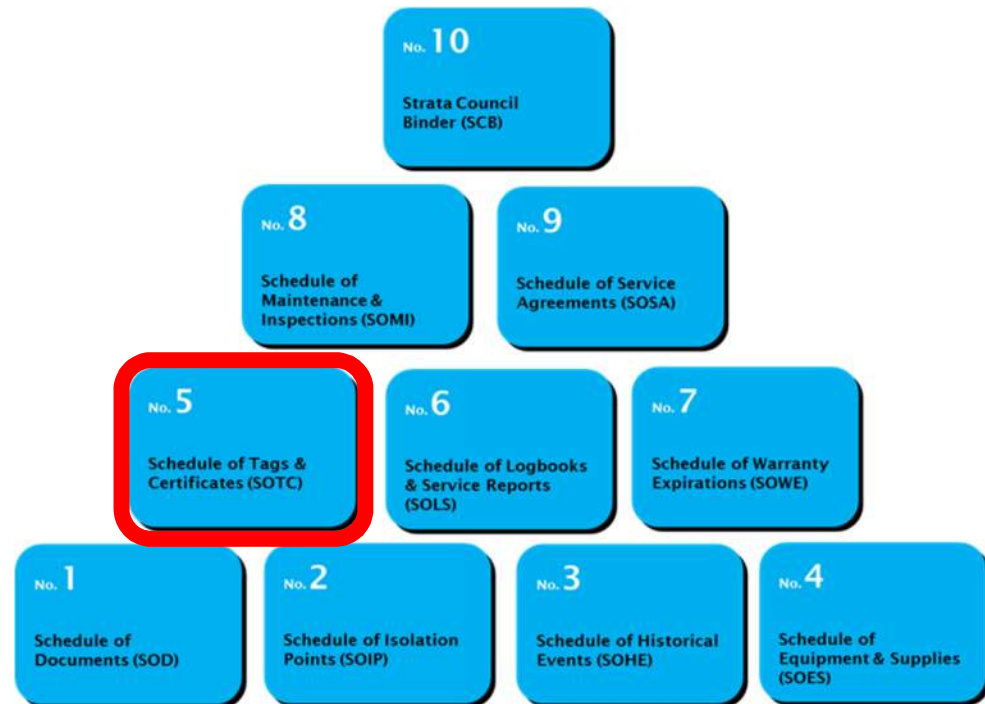
Date: _____

A.	Equipment	Quantity	Storage location	Notes	Entered by:
Example	12 foot ladder	x1	Storage shed	The ladder must be signed out	DA

B.	Supplies	Quantity	Storage location	Notes
Example	Fan filters	1 box	Mechanical room	12"x16" filters, no
1				
2				
3				
5				

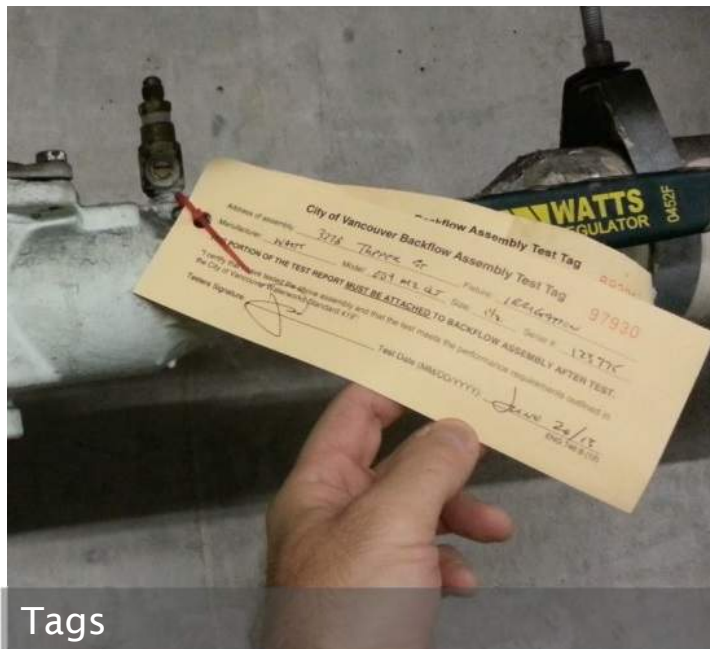
C.	Other	Quantity	Storage location	Notes	Entered by:
1					
2					
3					

Schedule Of Tags And Certificates (SOTC)



What Are Tags And Certificates..?

- Pieces of paper and labels, such as licences, that are attached to certain critical assets or located near the assets.
- Some tags and certificates cannot be kept at the management office. They must be on site.

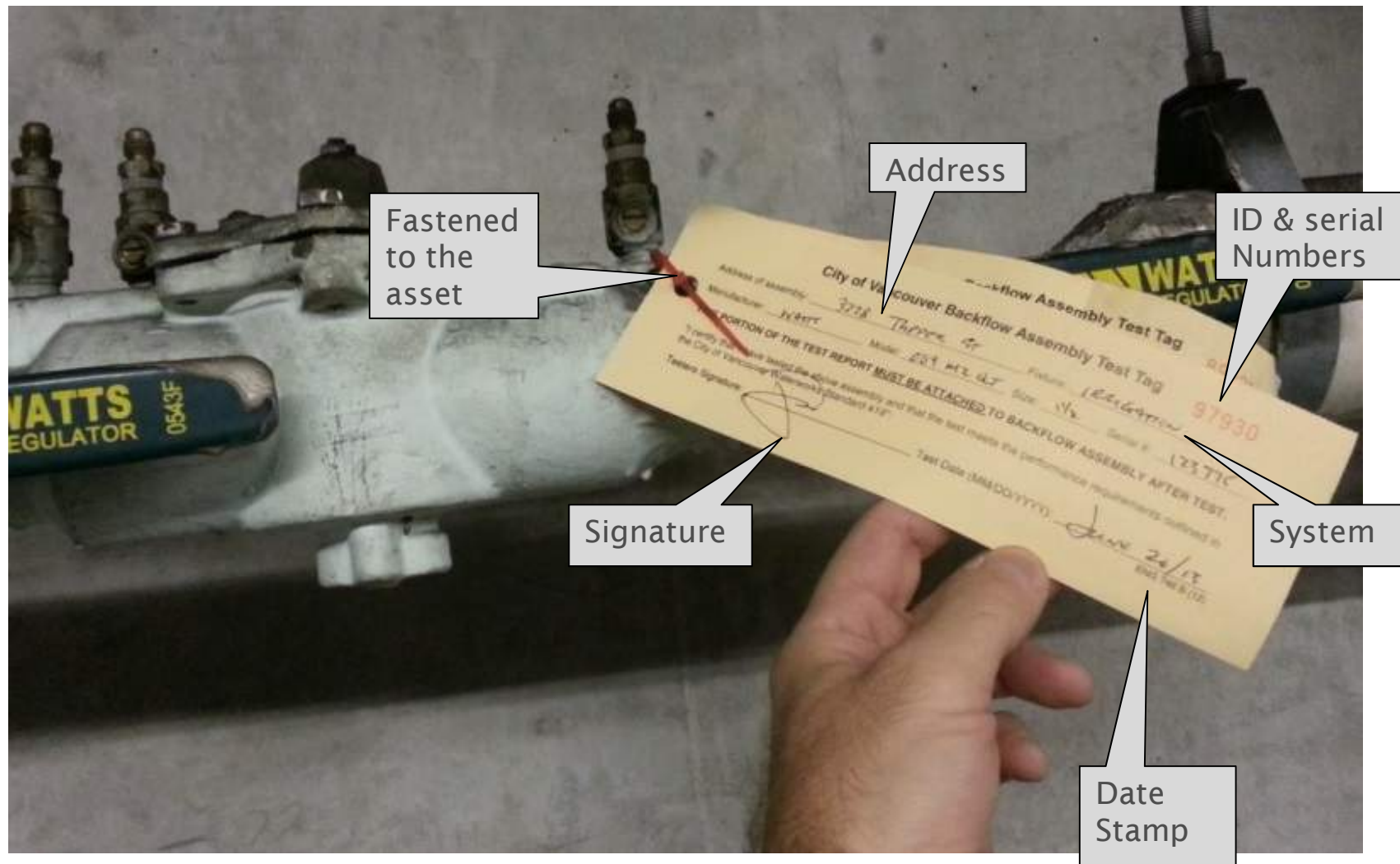


Tags

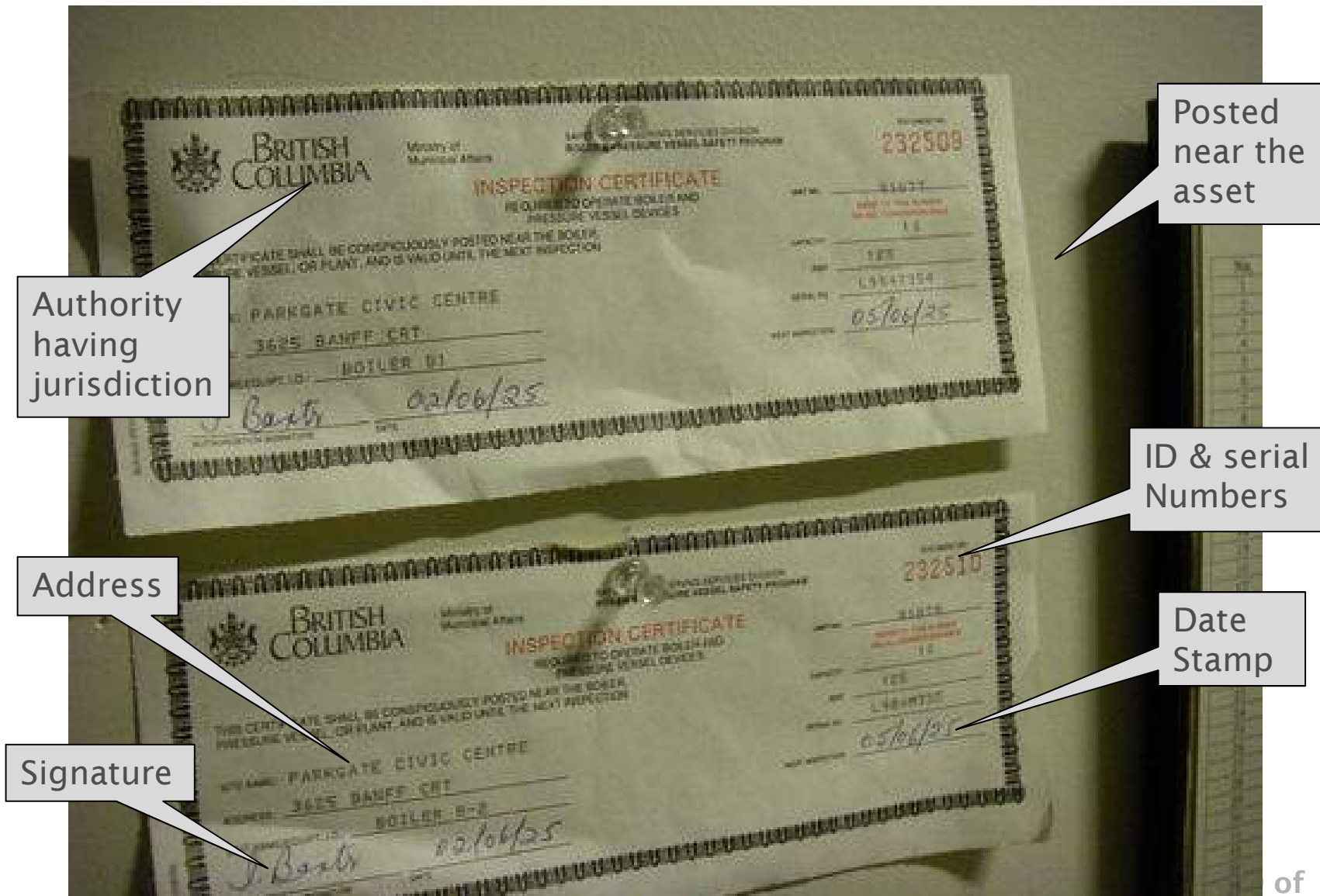


Certificates

Elements Of A Tag



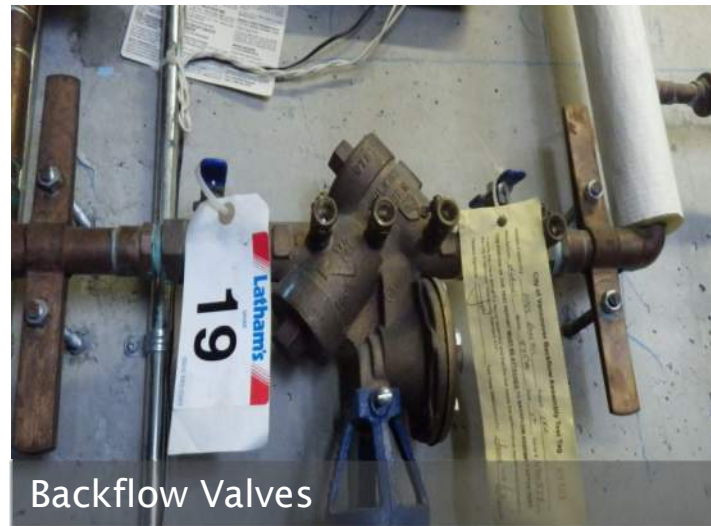
Elements Of A Certificate



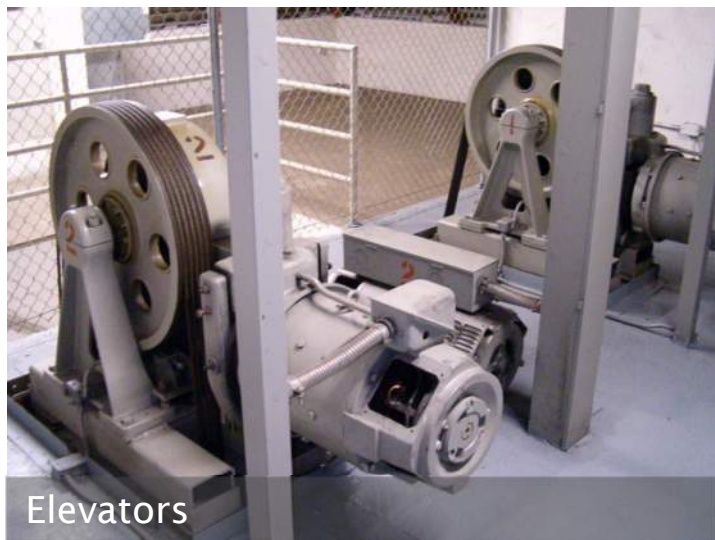
Examples Of Assets That Require Certificates



Boilers and pressure vessels



Backflow Valves

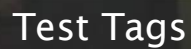
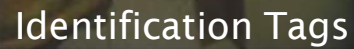


Elevators



Swimming Pools

RDH



Why Is SOTC important..?



→ Risk Management

- It is a mandatory requirement of safety codes (elevators, boilers, etc).
- The strata could be penalized if the tags/certificates are not visible.
- The insurance providers have an expectation when underwriting the strata insurance policy.

→ Accountability

- We need to know which company has tested our assets, when it was done, etc.

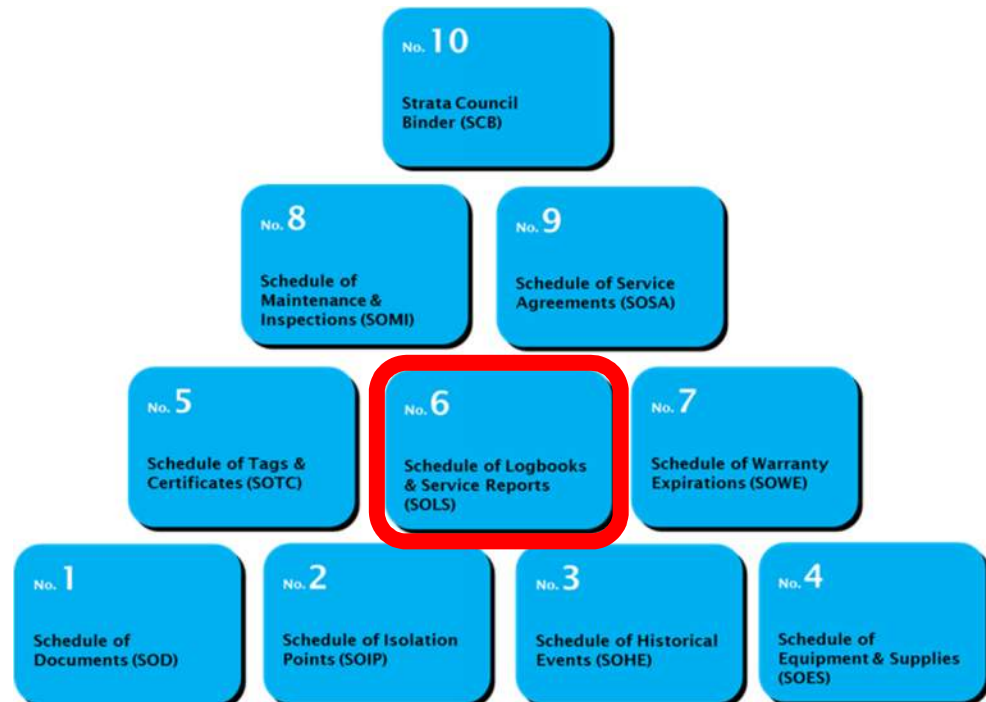
→ Safety

- Reputable trades may refuse to carry out work if certificates are not current and conspicuously posted (eg., fall protection verification).

→ Efficiency

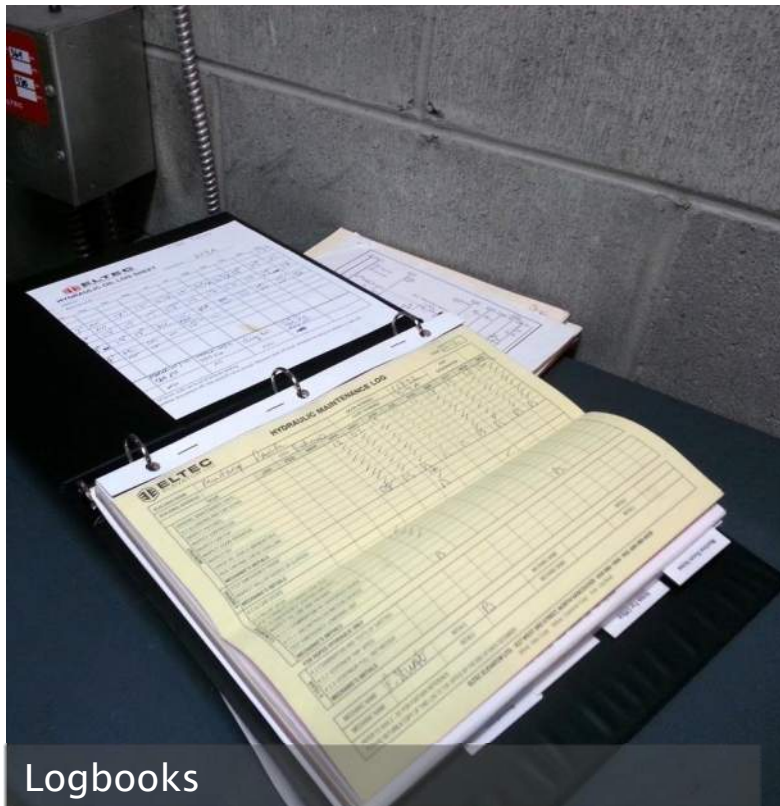
- It assists contractors and consultants.

Schedule Of Logbooks & Service Reports (SOLS)



What Are Logbooks And Service Reports..?

- Documents, usually kept in binders, that are kept near assets.
- Typically located inside the service rooms.

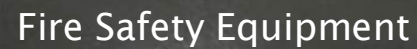
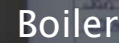


Logbooks

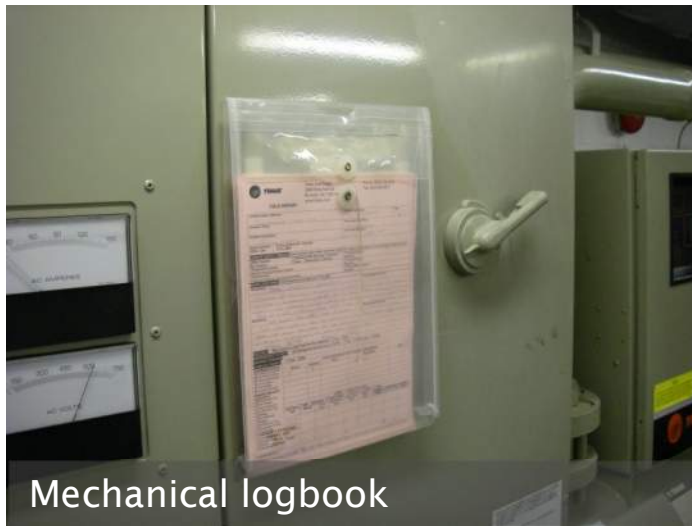
A screenshot of a 'Cesscom Maintenance Transaction Report' form. The form is divided into several sections. The top section is for 'Aircraft Identification and Status', including fields for AC Serial No., AC Reg. No., Date, and various engine and flight hours. The middle section is for 'Component Changes, Inspections, Service Bulletins, or Airworthiness Directives Accomplished', featuring a table with columns for Transaction No., Type, Item Name, Position, Installed Vendor Part Number, Mod Level, Installed Serial Number, Removal Reason, Installed Part Status, TSO (Enter if Change Desired), TSO Installed Part, Material Costs, and Man Hours. The bottom section is for 'Remarks' and includes fields for Work Order No., Maintenance Log Section, and Maintenance Log Page. It also has a section for 'Work Performed By' and 'Work Inspected By' with certificate numbers and dates. A red stamp at the bottom right reads 'Permanent Aircraft Record - File in Maintenance Log'.

Service Reports

RDH



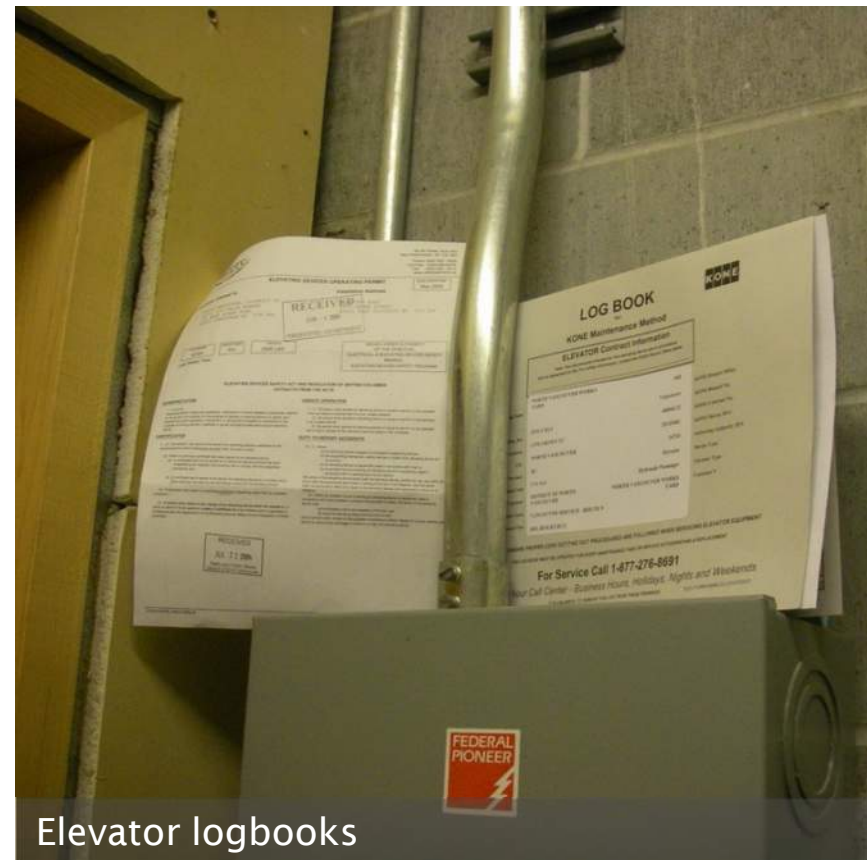
Logs & Reports Located Near The Assets...



Mechanical logbook



Fire alarm logbook



Elevator logbooks

→ **Due Diligence**

- They demonstrate to authorities having jurisdiction and other stakeholders that the corporation is properly maintaining its assets, e.g. warranty providers so that warranty coverage cannot be denied.

→ **Accountability**

- They keep an audit trail of who did the work and when it was done.

→ **Energy Usage**

- They are valuable tools when assessing historic energy use and performance.

→ **Operating Histories**

- They capture the history of certain critical assets.

Log Books & Service Reports Are Vulnerable...



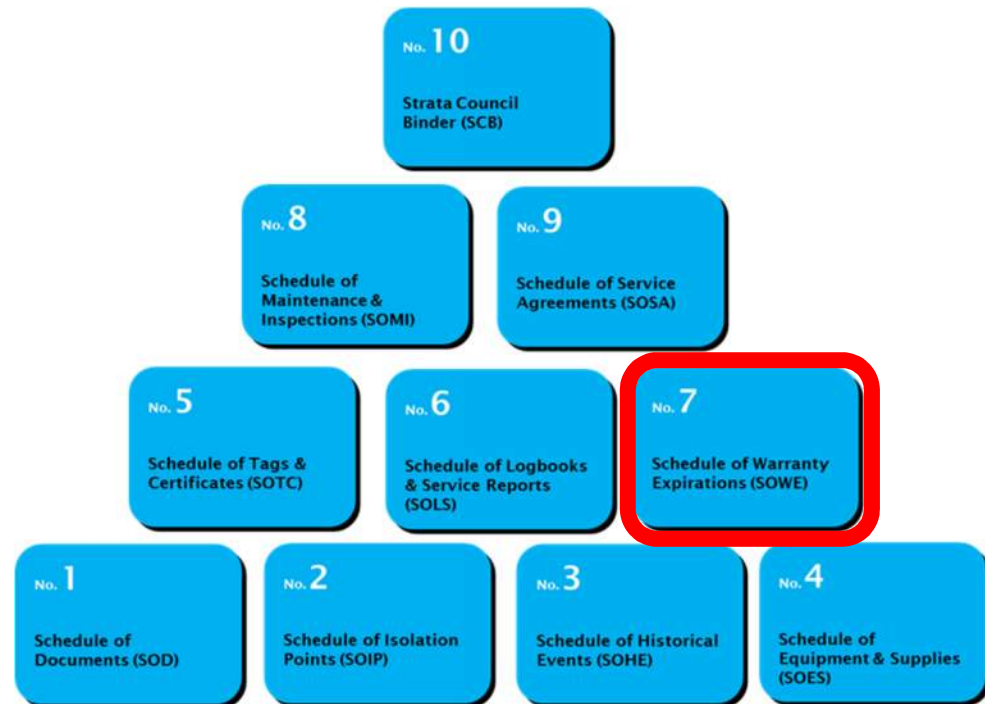
- Be careful for your log books and service reports. They are vulnerable to:
 - Being lost.
 - Being damaged by exposure to moisture and / or dust.
 - Having portions removed and not returned.
 - Inadequate quality of data entry.
- Where practical, keep duplicate or digital copies of your log books and service reports.

Why Is A SOLS Important..?



- It identifies what log books and service reports the strata has.
- It identifies the locations where log books and service reports can be found.

Schedule Of Warranty Expirations (SOWE)



Guides For Consumer Protection



GUIDE TO HOME WARRANTY INSURANCE IN BRITISH COLUMBIA



Published by the Homeowner Protection Office

2009



2-5-10 Year Home Warranty Insurance



HOME WARRANTY INSURANCE REQUIREMENTS FOR NEW HOMES

To increase consumer protection for new home buyers, the *Homeowner Protection Act* regulations for residential builder licensing and mandatory, third-party home warranty insurance were implemented on July 1, 1999. As a result, all new homes constructed with building permits applied for on or after July 1, 1999 must be built by residential builders licensed with the Homeowner Protection Office (HPO) and covered by a policy of home warranty insurance. In geographic areas where building permits are not required, licensing and home warranty insurance is required for new home construction commenced on or after July 1, 1999.

Home warranty insurance can now only be provided by insurance companies that have been approved by the Financial Institutions Commission (FICOM) and meet the requirements of the *Homeowner Protection Act*. (See the HPO bulletin entitled "Understanding Home Warranties" for further information.)

Standards of coverage, commencement dates, exclusions and limits on coverage are now set by government to ensure clarity and a consistent base-level of consumer protection.

MINIMUM STANDARDS OF COVERAGE REQUIRED: 2-5-10

Home warranty insurance on new homes includes a minimum of 2 years on labour and materials, 5 years on the building envelope, including water penetration, and 10 years on structure. The 2-year labour and materials coverage is broken down as follows:

- Any defect in materials and labour:
- 12 months on detached homes and on non-common property in strata units (includes fee simple homes)
 - 15 months on common property of strata buildings

Defects in materials and labour related to the delivery and distribution systems (electrical, plumbing, heating ventilation, air conditioning, etc.):

- 24 months for all buildings.

COMMENCEMENT DATES

Commencement dates on home warranty insurance are:

- Fee simple (primarily detached dwelling units):
- Custom homes: date of first occupancy or date of first occupancy permit, whichever transpires first.

- Spec. homes: Date of first occupancy or date of transfer of legal title to first owner, whichever transpires first.

Strata homes:

- Strata unit: earliest of date of first occupancy or date of transfer of legal title to first owner.
- Common property: earliest of date of first-unit occupancy in strata building or date of transfer of legal title to first owner in building.

HOME WARRANTY INSURANCE EXCLUSIONS

The *Homeowner Protection Act* regulations specify what the home warranty insurance companies can exclude from their policies.

General exclusions can include: landscaping; non-residential detached structures (however, parking structures, recreational and amenity facilities in multi-unit buildings are covered); commercial use areas, roads, curbs and lanes (however, driveways are covered); site grading and surface drainage; the operation of municipal services; septic tanks and fields; and water quality and quantity.

Defect related exclusions can include: normal wear and tear; normal shrinkage of materials from construction; use of new home for non-residential purposes; materials, labour and design supplied by the owner; damage caused by the anyone other than the residential builder; damage caused by insects or rodents; failure of an owner to prevent or minimize damage and acts of nature.

LIMITS ON COVERAGE

Coverage on claims is as follows:

Fee simple (primarily detached dwelling units):

- The lesser of the first owner's purchase price or \$200,000.

Strata homes:

- Strata unit: lesser of the first owner's purchase price or \$100,000.
- Common property: the lesser \$100,000 times the number of dwelling units in the building or \$2.5 million per building.

FOR MORE INFORMATION CONTACT

Homeowner Protection Office

telephone: (604) 646-7055

toll-free: 1-800-407-7757

fax: (604) 646-7051

email: hpo@hpo.bc.ca

Web site: www.hpo.bc.ca

RESTORING CONFIDENCE

10/09

Examples Of Warranty Certificates

SOPREMA

WARRANTY NUMBER: 479001246

15 YEAR PLATINUM WARRANTY

Name and address of owner:
LMS 1402
1688 West 13th Avenue
Vancouver, BC V7X 1A1

Name and address of contractor:
TNC Restorations Ltd.
1332 Oxford Street
Coquitlam, BC V3B 4G2

Name and address of project:
Dorchester Pines Phase II
1688 West 13th Avenue
Vancouver, BC

Project description:
Area: 1,700 sq. ft.
Date issued: September 13, 2007
Specification: Soprepla Base-520
Base sheet field area: Soprepla Traffic Cap-560
Cap sheet field area: Soprepla Traffic Cap-560
Base sheet flashings: Sopreflash Flam Stick
Cap sheet flashings: Sopreflash Flam Stick

SOPREMA INC., a legally constituted corporation with its registered office at 1640 rue Haggerty, Drummondville (Québec) J2C 5P8, warrants, to the above referenced owner, that Soprema will repair any leaks in the roofing membrane for the above-referenced building and roof area during the warranty period indicated above, beginning at the issue date of the warranty or at the date of substantial completion if applicable, subject to the LIMITATIONS and CONDITIONS set forth hereunder.

LIMITATIONS and CONDITIONS

1. In the event that manufacturing defects or deficiencies in the materials furnished or approved by SOPREMA INC. or an application defect by the approved roofing contractor which causes water infiltration to occur, and provided that the materials in question were installed in strict compliance with current published standards, instructions and specifications prepared by SOPREMA INC., SOPREMA INC. undertakes, for the duration of this warranty, to make all necessary repairs to restore the roofing system to dry and watertight condition. The liability of SOPREMA INC.

Duration of the warranty (15 years)



Examples Of Warranty Inter-Relationships

Warranty on
labour
(2 years)

Warranty on
the vision glass
(10 years)

Warranty on
frame
(2 years)



Why Is A SOWE Important..?



→ **Protection**

- To protect the owners in the event of a warranty claim.
- To avoid missing warranty expiry dates on claims.
- To give the owners time to prepare for warranty reviews, including the preparation of consultant reports, prior to the expiration of the warranty periods.
- To help ensure the owners do the necessary maintenance and care to guard against voiding of any warranties.

→ **Accountability**

- To hold contractors and others accountable in accordance with the terms and conditions of the warranties.

→ **Cost Savings**

- To avoid spending money on items that are covered by warranty.

Template For A SOWE

No. 7

Schedule of Warranty Expirations (SOWE)

Strata Number: _____

Date: _____

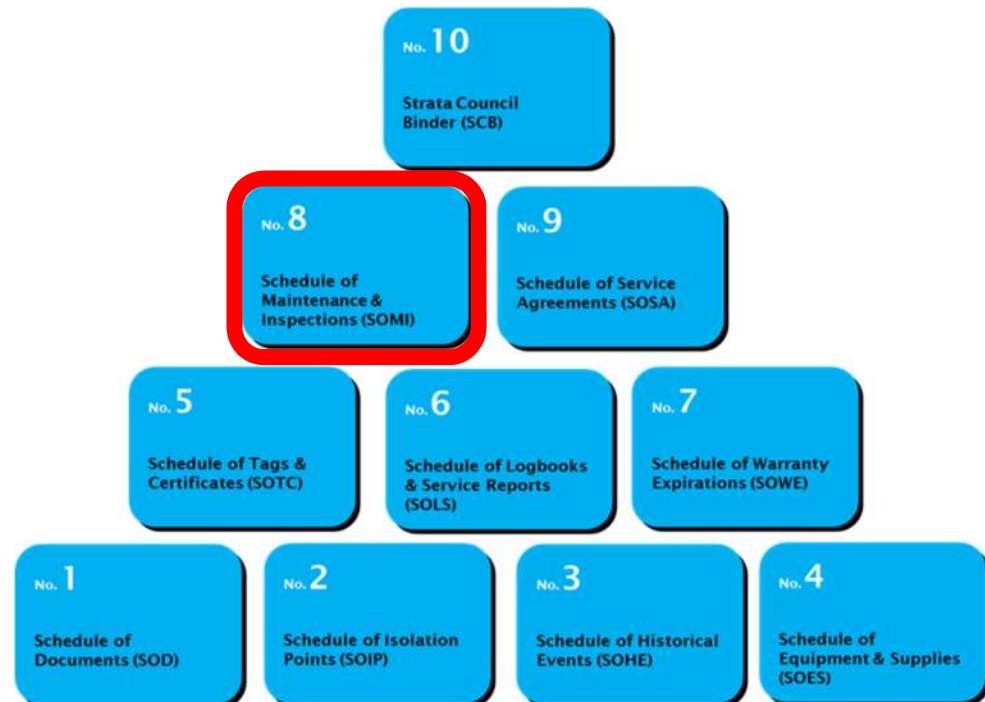
A.	Building Enclosure (roofs, windows, etc)	Duration	Expiration	Contractor	Consultant	Notes	Entered by:
Example	Shingle roof - manufacturer	25 years	2025	ABC roofing	None	Pabco shingles	DA

A.	Building Enclosure (roofs, windows, etc)	Duration	Expiration	Contractor	Consultant	Notes
Example	Shingle roof - manufacturer	25 years	2025	ABC roofing	None	Pabco shingles
	Shingle roof - contractor warranty	1 year				
1						
2						
3						

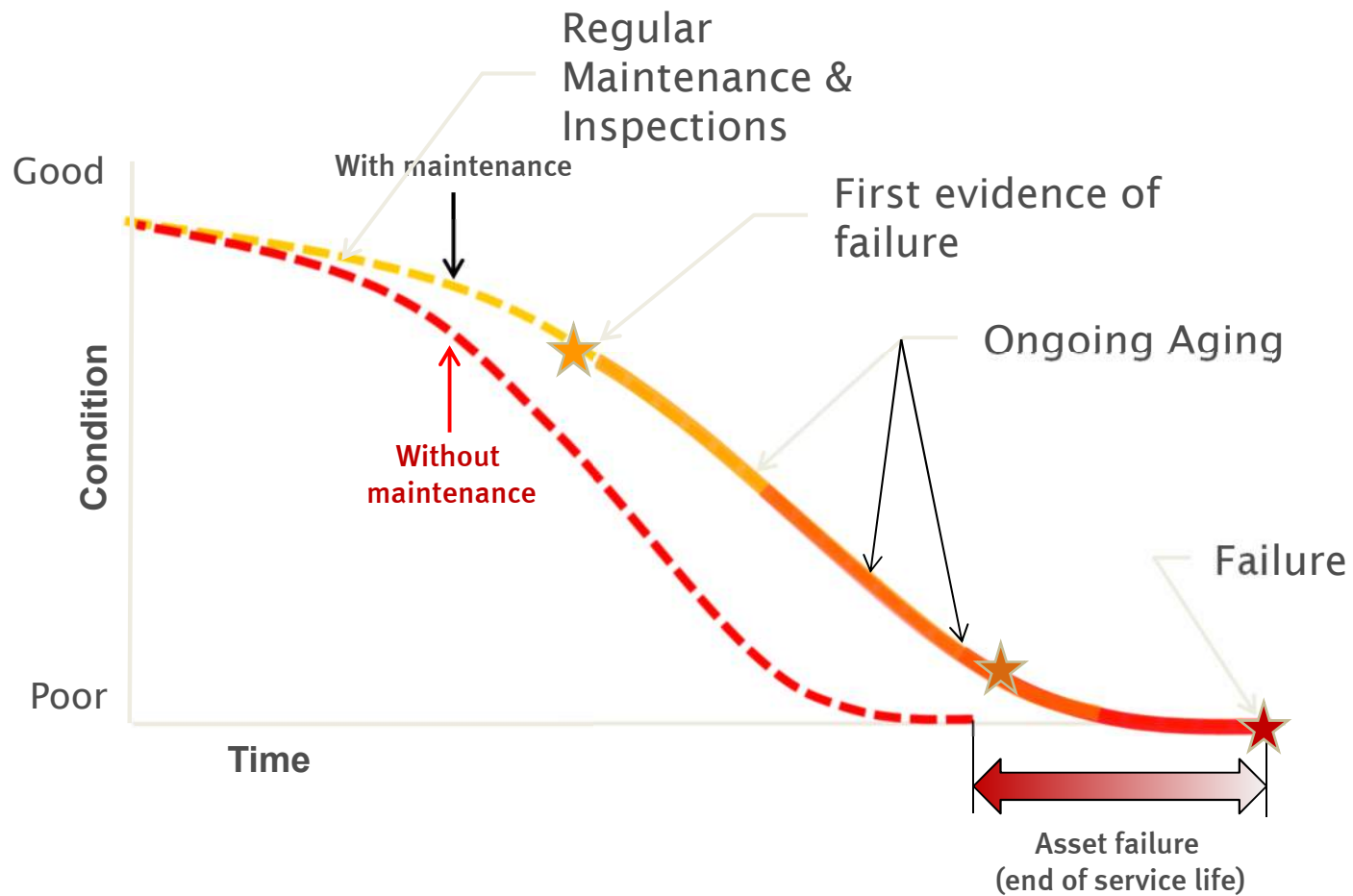
3						
---	--	--	--	--	--	--

C.	Mechanical System (pumps, fans, motors, boilers, etc)	Date	Expiration	Contractor	Consultant	Notes	Entered by:
1							
2							
3							
4							

Schedule Of Maintenance & Inspections (SOMI)



Maintenance & Asset Condition – Slide 1



Minor And Major Maintenance Examples...

Minor Maintenance:

Performed yearly or more often.



- For example, weekly, monthly, quarterly, semi-annually.
- Example: Vacuum the hallway carpets.
- Paid from the operating budget.

Major Maintenance:

Performed less frequently than yearly.



Exterior painting (5-8 years)

- For example, every 2,3, 5, 10 years.
- Example: thermal scanning of electrical panels
- Paid from the contingency reserve fund.

Not All Maintenance Needs Are Visible

RDH



In-Ground Camera Scoping Surveys



Maintenance Checklists

ENCLOSURE			Freq.	Event Cost *
Enc 1 Roof Membranes w/ Ballast				
M1	Annualized Cost	Aggregate annual costs for maintenance of urethane membrane with ballast.	1 Yr.	\$600
M2	Maintenance Level 1	Clean roof drains.	6 Mo.	Annualized
M3	Maintenance Level 1	Clean exposed surface of roof assembly to remove seasonal debris, pollutants, dust, dirt and other materials.	1 Yr.	Annualized
M4	Maintenance Level 2	Remove ballast and visually review the surface of the membrane for signs of distress, such as delamination and blistering.	1 Yr.	Annualized
M5	Maintenance Level 3	Locally repaint flashings.	15 Yr.	\$2,000
R1	Renew Component	Replace urethane membranes in the triangular townhouse roof areas.	20 Yr.	\$80,000
R2	Renew Assembly	Replace urethane membranes at the top of the tower and above Drake St townhouses.	20 Yr.	\$120,000
O1	Operational Events	Ensure that a log is maintained of all tenant installed equipment and service penetrations through the roof.	as req.	Annualized
A1	Assessment	Review adequacy of roof maintenance checklists and frequencies. Update the maintenance plan based on environmental conditions, experiences over the preceding year, and feedback from service contractors.	1 Yr.	Annualized
O2	Operational Events	Ensure that adequate safety measures are taken when performing maintenance and repair activities at the perimeter of the roofs.	as req.	Annualized
O3	Operational Events	Ensure that access onto the roof is limited only to essential maintenance personnel.	as req.	Annualized
O4	Operational Events	If a new penetration must be made through the roof, contact the product manufacturer or original roofing trade for appropriate tie-in details and to ensure warranties are maintained.	as req.	Annualized
O5	Operational Events	Ensure that window washing contractors use rope guards in all locations where the ropes come in contact with the parapet conditions at the edge of the roof.	as req.	Annualized
O6	Operational Events	Ensure that a log is kept of rooftop equipment and service penetrations through the roof.	as req.	Annualized
O7	Operational Events	When it is necessary for workers to be on the roof to service roof top equipment (such as HVAC or telecommunication antennas), workers should be cautioned to use walkways and to exercise care with their tools and equipment to avoid puncturing the roof membrane.	as req.	Annualized
Enc 2 Deck Membranes w/ Pavers				
M1	Annualized Cost	Aggregate annual costs for maintenance of inverted roof with urethane membrane and overlaid with pavers.	1 Yr.	\$1,800
M2	Maintenance Level 1	Remove debris from all drains and scuppers, including vegetation so drainage is not obstructed.	6 Mo.	Annualized
M3	Maintenance Level 1	Clean exposed surface of roof assembly to remove seasonal debris, pollutants, dust, dirt and other materials.	1 Yr.	Annualized
M4	Maintenance Level 1	Power wash pavers. (Costs borne by unit owners).	2 Yr.	Annualized
M5	Maintenance Level 2	Remove pavers at selected locations and visually review the surface of the membrane, particularly at penetrations, for signs of distress, such as delamination, cracks.	1 Yr.	Annualized

- By asset.
- By season.
- By skill level or person.
- By frequency.
- By location.

Template For A SOMI



No. 8

Schedule of Maintenance & Inspections (SOMI)

Strata Number: _____

Date: _____

a	B	C	D	E	F	G	H	I	J	K	L	M
Component	Location	Description	Chronological Age	Effective Age	Service Life (years)	Remaining Life (years)	Outstanding Conditions	Frequency of Inspection	Service Provider	Projected Annual Cost	Contract Supervisor	Reporting Requirements
Example: Roof	3rd floor of main building	2-ply SBS roof	10	10	25	15	none	Yearly	ABC roofing	\$1,200	Property manager	Semi-annual
1												
2												
3												
4												
5												
6												
7												
8												
9												
10												
11												

“Failing to Plan
is
Planning to Fail.”

A Few Of My Favorite Photos – Page 1



A Few Of My Favorite Photos – Page 2



A Few Of My Favorite Photos – Page 3

RDH

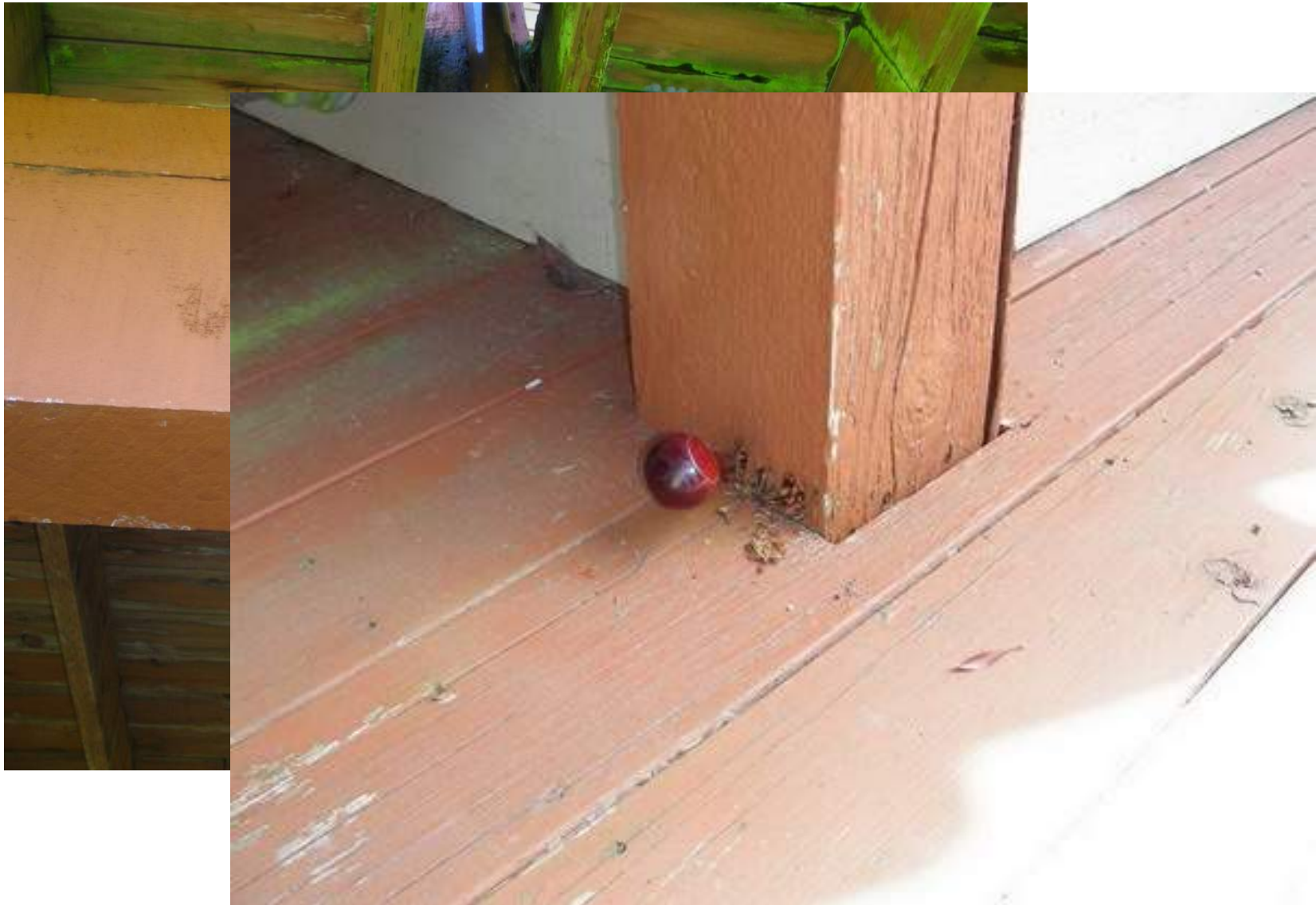


A Few Of My Favorite Photos – Page 4



A Few Of My Favorite Photos – Page 5

RDH



Why Is A SOMI Important..?



→ **Planning**

- To identify resource requirements.
- To help track and verify that a program has been completed.
- To schedule staff and coordinate with the ownership.

→ **Estimating**

- To determine optimal pricing for maintenance.

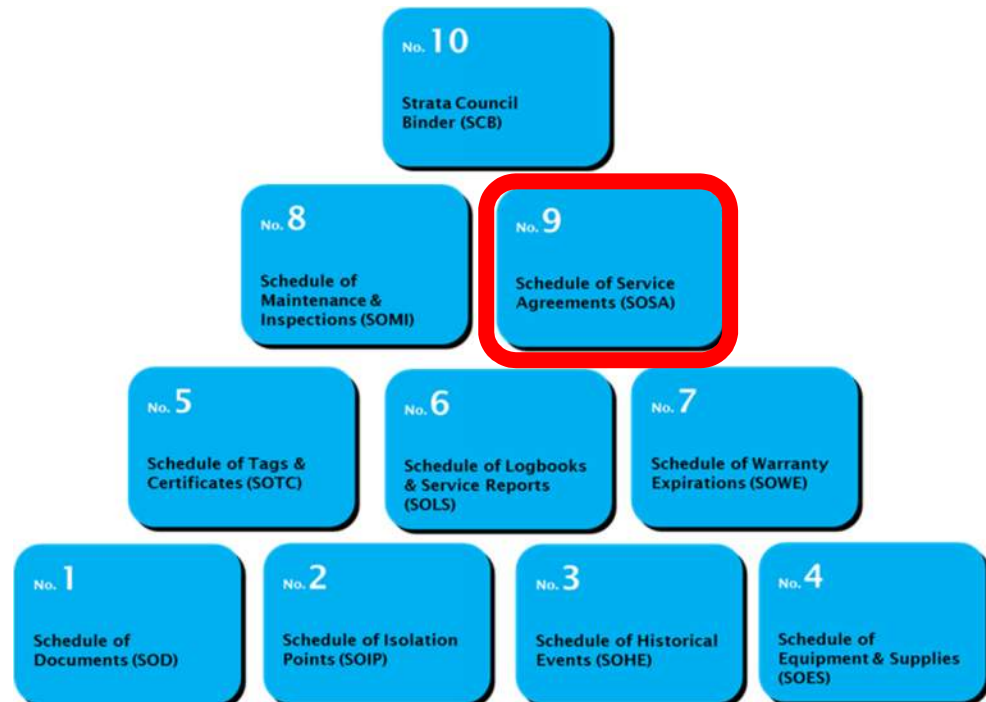
→ **Budgeting**

- To inform the owners to be prepared and not surprised.

→ **Funding**

- To demonstrate the need for adequate funding to complete the necessary work.

Schedule Of Service Agreements (SOSA)



Service Contracts/Agreements



Renewal or Termination:

This agreement will automatically renew annually unless cancelled by either party within 30 days of written notice.

CUSTOMER'S OBLIGATIONS

The Customer is responsible for ensuring that elevator pits are free of water and rubbish.

The Customer will provide or allow prompt access to the Equipment for the Equipment.

The first year maintenance service price \$ Five Thousand Five Hundred (\$1,375.00 Quarterly)

Plus applicable taxes, shall be ☒ Quarterly ☐ Semi ☐ Annual, in advance

Method of payment shall be ☐ Electronic Debit ☒ Invoiced.

Service shall commence on November 1, 2000

Maintenance Service Agreement term: ☒ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ Years

Which Assets Need Service Agreements..?



Townhouse Complex

Standard

- Landscaping
- Groundskeeping
- Snow clearing
- Pest control
- Pool/spa

Typically Neglected

- Roofs
- Site Infrastructure



Low-Rise Buildings

Standard

- Elevators
- HVAC
- Fire safety/alarm
- Janitorial
- Landscaping
- Pool/spa

Typically Neglected

- Roofs, decks, balconies



High-Rise Buildings

Standard

- Fall protection
- Elevators
- HVAC
- Standby Generator
- Fire safety/alarm
- Pool/spa/fitness equip.
- Janitorial
- Landscaping

Typically Neglected

- Roofs, decks, balconies
- Walls & glazing
- Drainage

Why Do You Need A SOSA - A Short Story...



- A 12 year old strata corporation hired an engineering firm to prepare a depreciation report.
- During the site visit, a fan in the parkade was found to be inoperable and the gas sensors were also not working.
- No test tags on the equipment.
- The documents were reviewed. The HVAC contractor did not include this equipment in their mechanical inventory
- The fan remained un-serviced for 12 years and the gas sensors were not tested so the owners were not protected against gas buildup in the parkade or the adjacent occupied areas.

Why Is A SOSA Important?



- To help manage service providers:
 - To institute cost controls.
 - To establish reporting requirements.
 - To establish performance schedules.

Template For SOSA



No. 9

Schedule of Service Agreements (SOSA)

Strata Number: _____
Date: _____

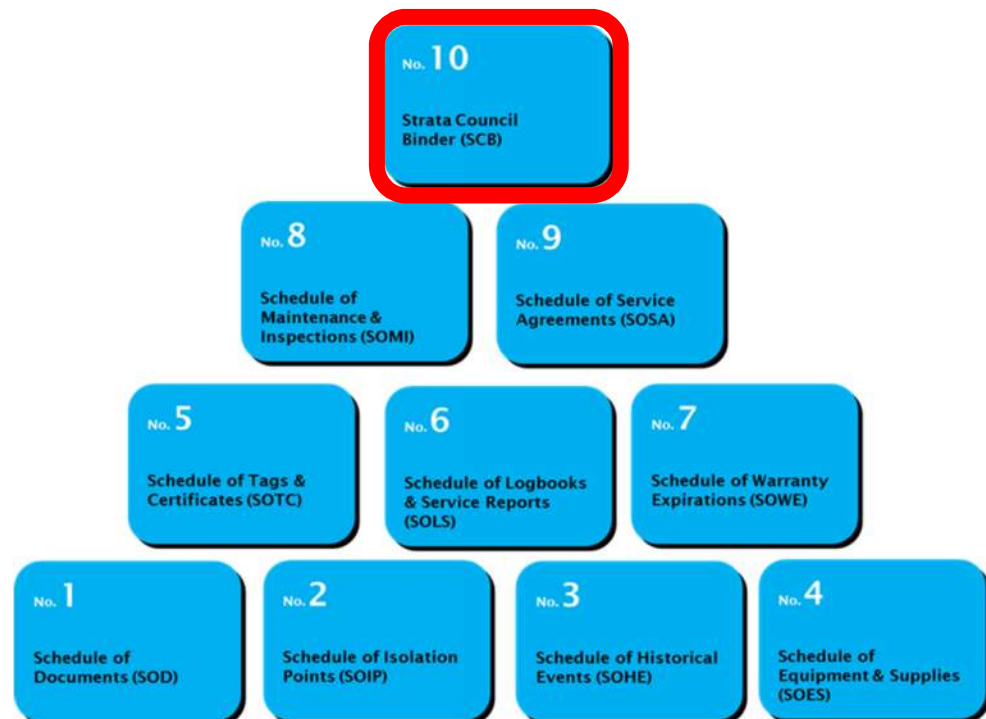
A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
Contractor	Scope of	Contract on File	Start Date	Renewal Anniversary	Review	Term of	Contract	Reporting	Value \$	Terms \$	Contact	Contact Phone	Contact Email	Work	13. supervi	Projected Completio

Contractor	Scope of Service	Contract on File Locator	Start Date	Renewal Anniversary Date	Review Date	Term of Contract	Contract Supervisor*	Reporting Obligations	Value \$	
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Example: 123 Mechanical	HVAC	Property manager	2008	Mar. 2014	Dec. 2013	See file	Property manager	Quarterly	\$6,000	
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1																
2																
3																
4																
5																

Strata Council Binder (SCB)



What Is A SCB..?



- It's a master library / compilation of reference documents.
- Ideally its both in:
 - Physical form.
 - Electronic form.
- It is updateable.
- It's portable.
- It's useable.

Strata Council Facility Binder

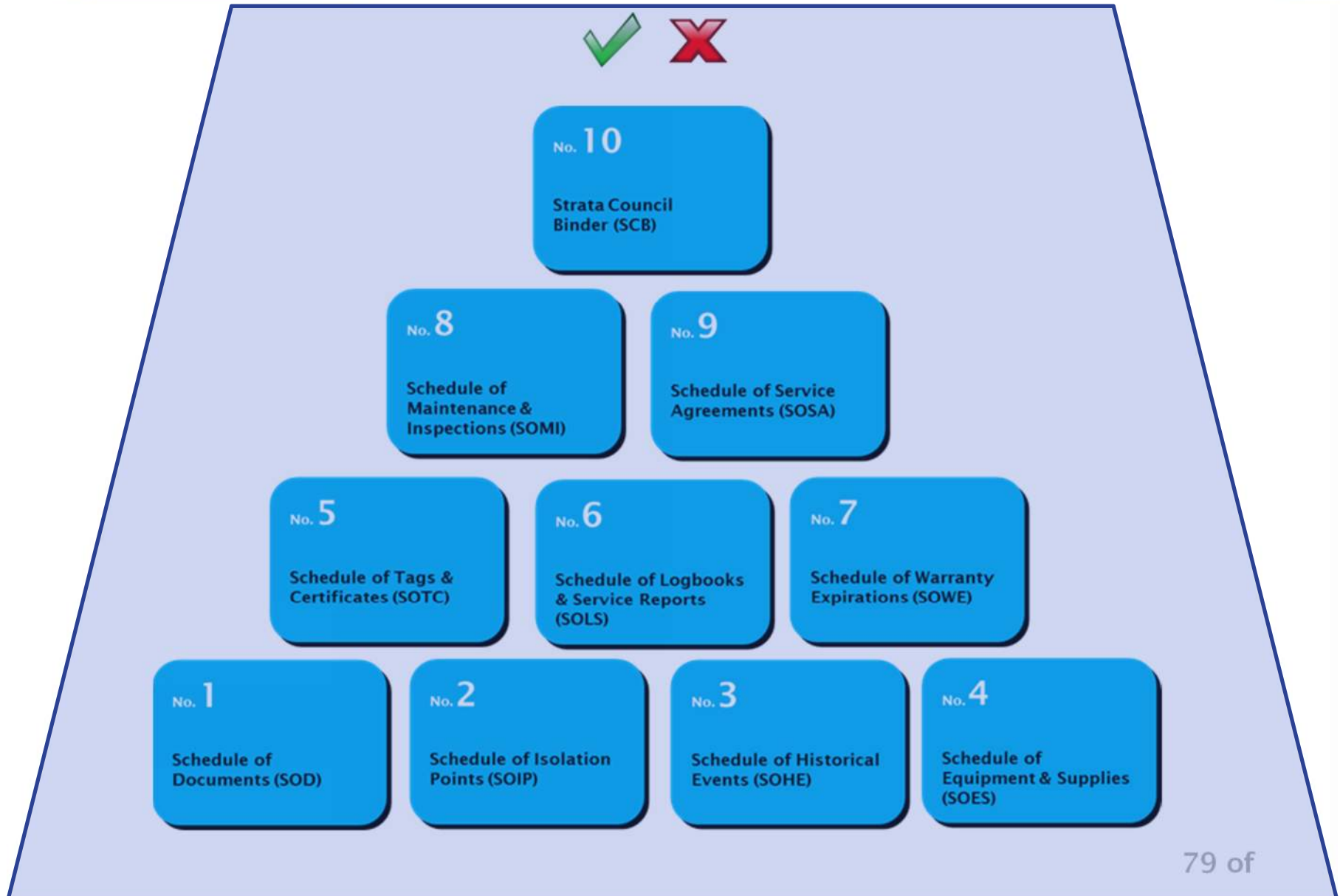
Registered Bylaws, Rules, Parking Space & Storage Locker Plans	1
Strata Plan Common Index, Schedules of Voting Entitlement	2
Annual Operations Plan	3
Depreciation Report	4
Strata Property Act & Regulations	5
Insurance Documents	6
Annual Budget & ¼ Vote Resolutions for Special Levies or CRF Expenses	7
AGM/SGM Minutes	8
Council Meeting Minutes	9
Monthly Financials	10

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Why Is A SCB Important..?

- It includes information to aid in decision making:
 - Objective decisions based on fact.
 - It facilitates consistent decisions over time.
- It's a central source of information to help you:
 - Know what you have.
 - Know where you have it.
 - Not get overwhelmed by issues.
- It helps manage transitions:
 - New strata councils.
 - New strata managers.
 - New strata management.
- It helps manage the evolution of the community.

Self Evaluation – What Tools Are You Missing..?



A Couple Of Examples...



→ Here are a couple of examples of how the tools work together...

A Pipe Has Burst, What Do We Do..?

Before the event:

- Ensure that **SO Isolation Points** is up to date
- Ensure that valves are being maintained in accordance with **SO Maintenance & Inspections**

During the event:

- Go to **SO Isolation Points** to confirm location of valves. Or, go to the mechanical room and review the valve chart
- Follow the shut off procedures
- Call the service contractor listed in **SO Service Agreements** to carry out the necessary repairs

After the event:

- Record what happened in **SO Historical Events**

We Are Unhappy With Our Contractor, What Do We Do? RDH

- Go to **SO Service Agreements** to determine their contract obligations:
 - What do we need to do to improve the situation?
 - What are our obligations?
 - What are theirs?
- Go to **SO Maintenance & Inspections** to confirm what maintenance schedules are necessary:
 - Are they meeting our needs?
 - Is it written in the agreement?
- Go to **SO Tags & Certificates** to confirm whether the contractor signed the tags and certificates:
 - Have they fulfilled their obligations?
- Go to **SO Equipment Supplies** to determine what equipment and supplies are on site that belong to the contractor:
 - Is everything we need available?

To Get The Maintenance Workbook...



→Go to:

<http://learning.rdh.com/workbook>





Questions

→ rdhbe.com

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