

Vancouver Island Strata Owners' Association
in cooperation with
Unity Services Corporation



Strata Maintenance & Procurement:
A Directed Approach

Welcome

We're going to cover a lot today...

- Setting Standards for Maintenance
- Picking Contractors
- Project Development
- Project Management

Let's define some parameters....



DEFINITIONS

A single word can have many.

Setting a Maintenance Standard

- Cost vs. Value



A Strata's "Business" is Procurement

- What do we mean by "procurement"?
 - Homeowner vs. Strata Corporation
 - "Lucy...You got some 'splainin' to do..!!"
 - Documenting the process
- Transparency
 - Single vs. Multiple Quotes
- What are bidders bidding on...???



Annual Service Contracts

- Where do they apply.??
 - Waste removal
 - Grounds Keeping
 - Janitorial
 - Elevators
 - Life Safety Systems
 - Boiler/Mechanical Maintenance
 - Strata Management...??



Other “Stuff”

- Window Cleaning
- Chimney Inspection/Cleaning
- Gutter Cleaning
- Roof Inspections
 - Contractors vs. Consultants



Old “habits” (service contractors) die hard...

- Is the contractor providing the services required.?
- Are they cost competitive.?
- Who’s supervising their work.?
- Is there a formal Service Contract.?
- When was it last reviewed.?
- Who’s contract is it.??...the Contractor’s, or the Strata’s.??

Where's our Strata Manager...???

When You Make a Call...

- What most Strata Managers do...
 - Send a Contractor...
 - Who are these guys anyway..??
- What most don't do...
 - Direct or manage the contractor
 - Follow up

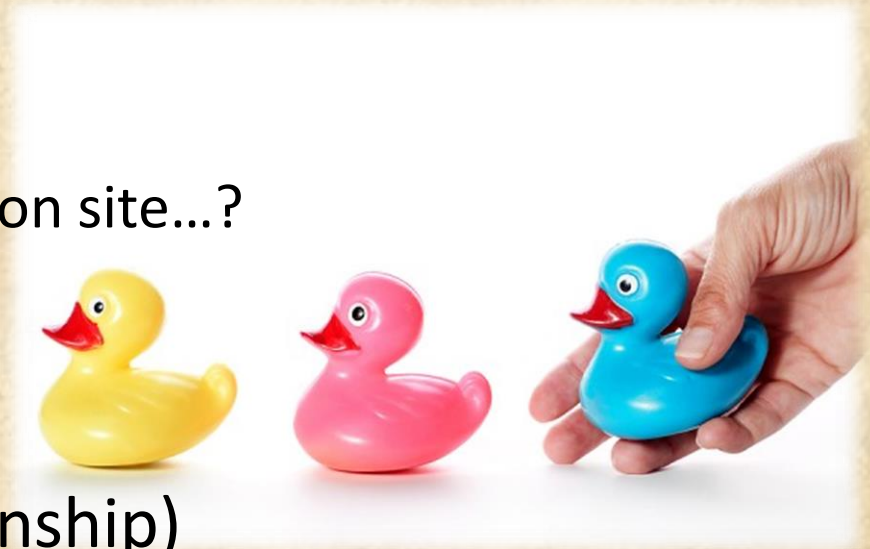
Reliability is key...for both parties



Oh what to do, what to dooo?

How do YOU pick a contractor...??

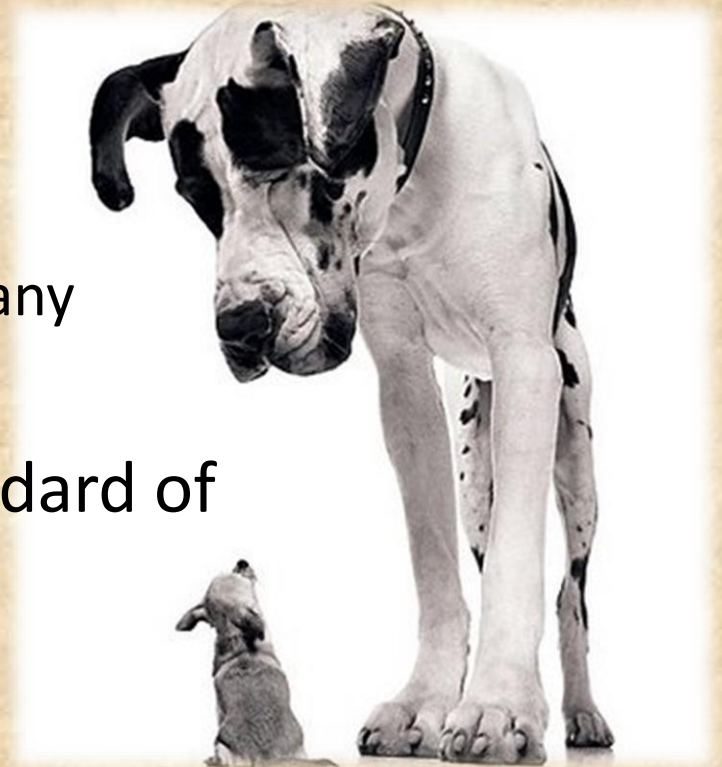
- Ask for References
 - Talk to the owners
 - How was the contractor on site...?
 - Communication...?
- Site Checks
 - Go look at the work(manship)
- Check with BBB & Professional Associations
 - Trades qualifications...?



Who do you choose...???

“Little Guys” vs. “Big Guys”

- Big Guys mean “Big Costs”
 - Let’s talk about a contractors’ “cost of doing business”
- What’s a “Little Guy” ...?
 - Sole Proprietor vs. Limited Company
 - The “Handyman”
- Can they meet the Strata’s Standard of Maintenance...?



The Strata Corporation & Risk Management

- Why a Strata can't do what a home/building owner can do
 - Strata Property Act Sec. 72
 - (1) Subject to subsection (2), the strata corporation **must*** repair and maintain common property and common assets.
 - (2) The strata corporation **may***, by bylaw, make an owner responsible for the repair and maintenance of
 - (a) limited common property that the owner has a right to use, or
 - (b) common property other than limited common property only if identified in the regulations and subject to prescribed restrictions.
 - (3) The strata corporation **may***, by bylaw, take responsibility for the repair and maintenance of specified portions of a strata lot.
- This is about your “Community”..!!!
 - * USC emphasis

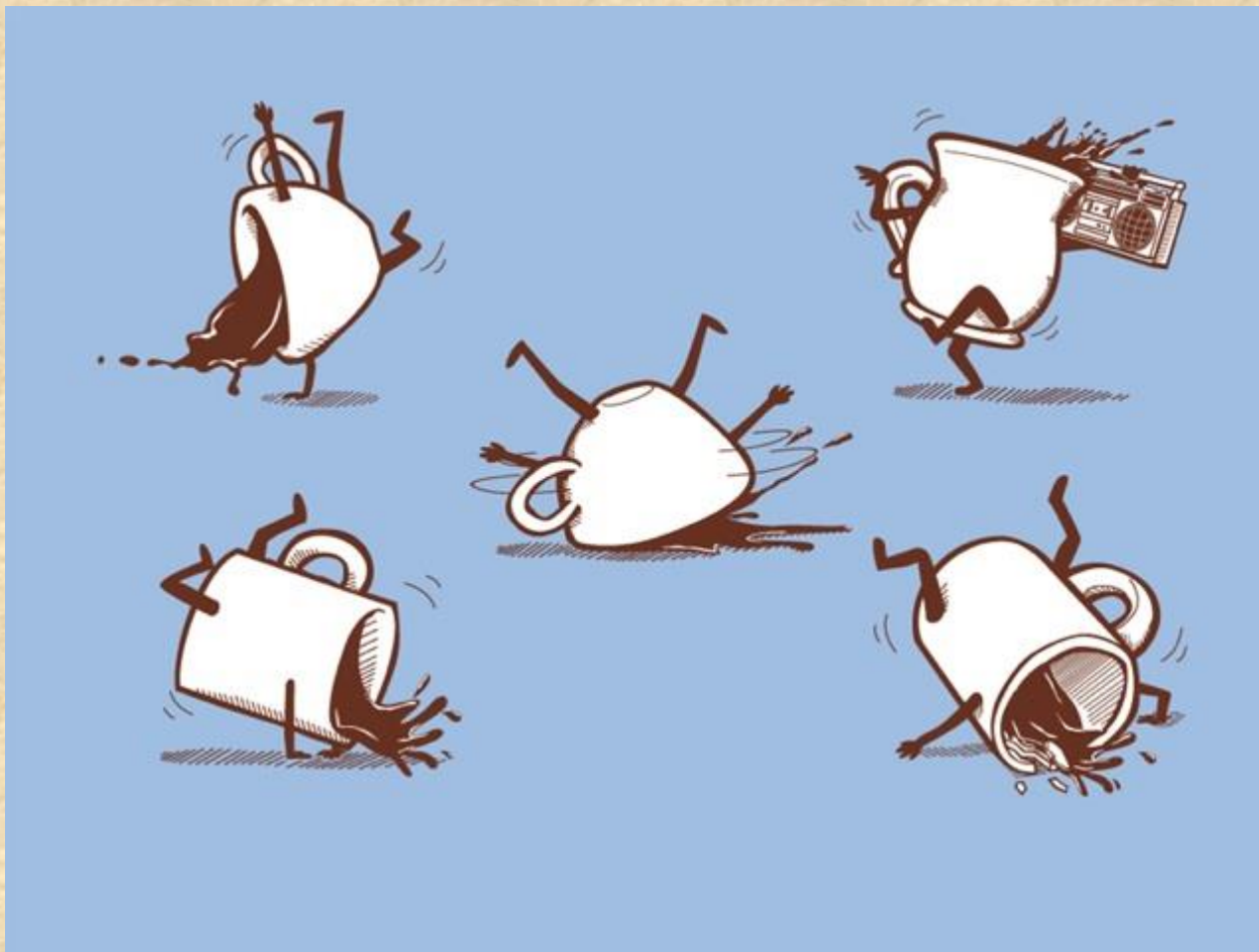
“..act in the best interest of..”



Project “Insurance”

- The Strata & WorkSafe BC
 - Contractor “Registration”
 - Contractor “Compliance”
 - Strata Registration with WSBC
 - Volunteers & Non-registered contractors
- Who’s taking the risk..??

Take a Break!



Procurement: A “Case Study”

- Roof Replacement
(...’cause everybody has one..;)
- This is applicable to ANY major system or component of the property.
- The most important point is:
“THIS PROCESS IS GOING TO TAKE TIME”
 - This is NOT grab three quotes & do it next week.
 - Large projects can take a year or more to plan.

“Get Three (Roof) Quotes”

- Who Ya’ Gonna’ Call..??
 - Contractor training & education
 - Steep Slope
 - Low Slope
- What are the contractors bidding on.??
- Who decides what kind of replacement..??
 - Cheap – Good – Better – Best...??
 - Materials & Application

Project Design & Development: **STEP 1**

- Gathering information
 - What's the desired result...?
 - clarifying what you want/need
- Informal discussions
 - Contractors
 - Consultants
 - Municipal requirements
- Preliminary Design
 - Concepts & Options



Project Design & Development: **STEP 2**

- Hiring a Consultant
 - Determining the Consultant's scope of work
 - Request for Proposal (RFP)
- Conceptual Design
 - What do the Owners want..??
- Formal design & specification
 - Opinion of Probable Cost (OPC)
- Project Management...??
 - Is the Consultant going to be your Project Manager...?

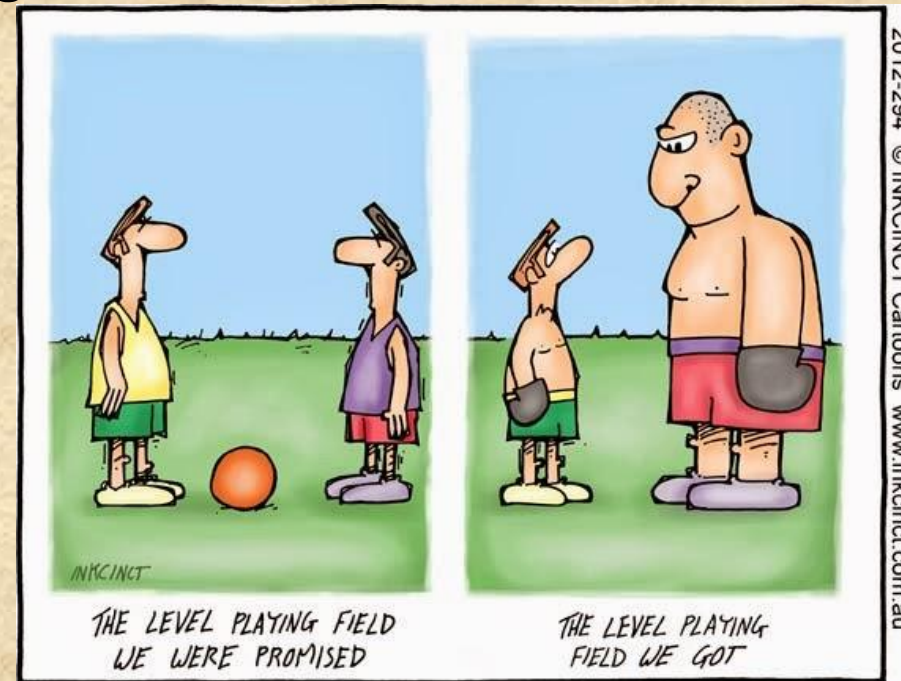


Project Design & Development: **STEP 3**

- Project Tendering
 - Quotes vs. RFQ (Request for Quotation)
- Contract Conditions
 - CCDC-2 Contract Forms
 - Less formal options...(What are the risks..??)
- Contract Award
- Project Management

Levelling the “Playing Field”

- Roofing (& Other) Consultants
 - Assessing the conditions
 - Replacement Specifications
 - Correcting original design deficiencies
 - Codes & Standards
 - Materials choices
 - Application standards
 - Tendering & Contracts
 - Project oversight



Choosing “Invited” Contractors

- Consultant recommendations
 - Contractor qualifications
 - “Big Guy” vs. “Little Guy”
 - What is your Standard...???
 - Who’s going to ensure that Standard is met.??
 - The Contractor..??
 - Internal resources..??
 - A Consultant..??
- How much RISK is the Strata prepared to accept..??

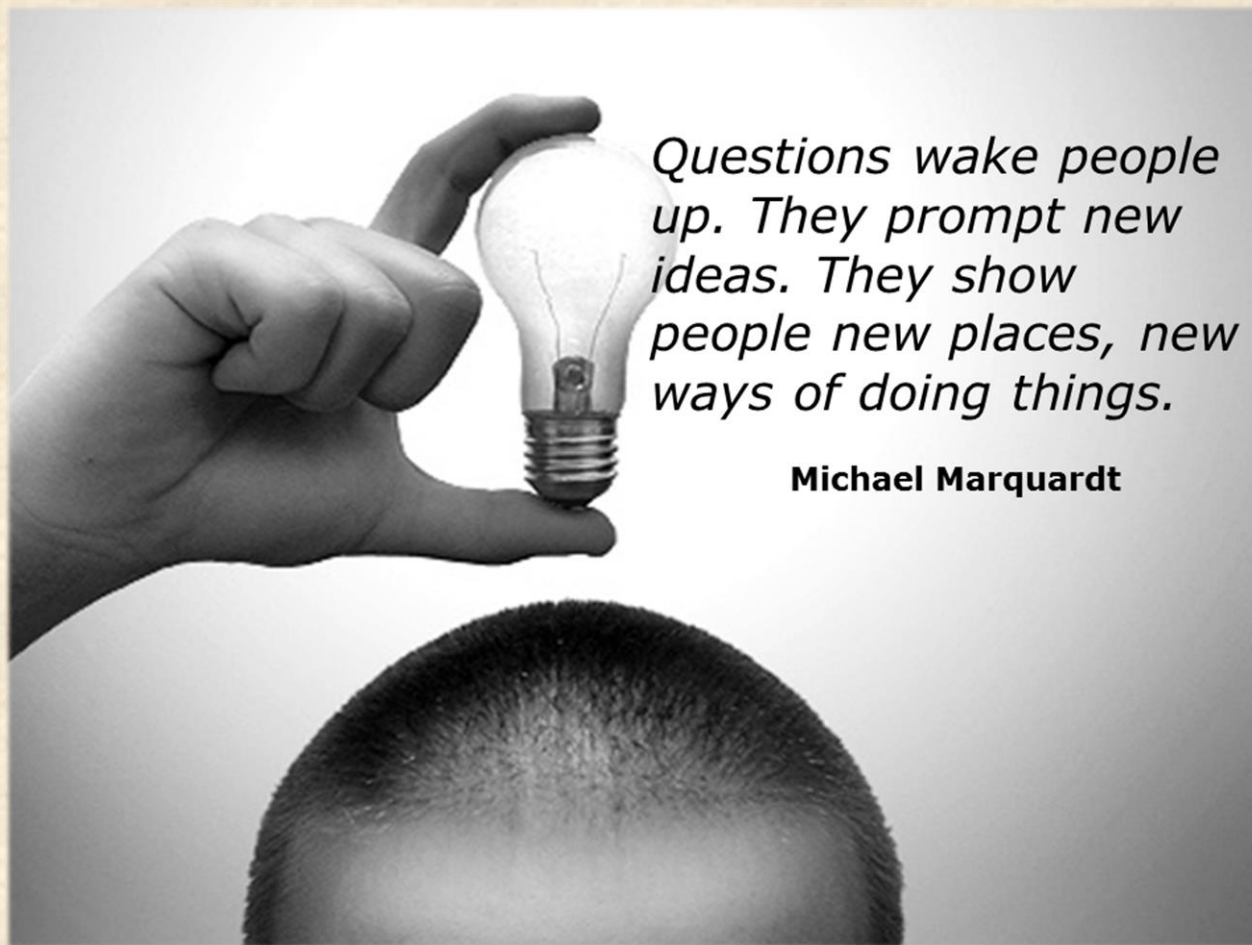
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Reference Materials

- Homeowner Protection Office (HPO)
 - Maintenance Matters - Pamphlets & Videos
<https://hpo.bc.ca/maintenance-matters>
- Vancouver Island Strata Owners Association
 - Seminar Handouts & Speakers' Notes
http://www.visoa.bc.ca/?page_id=3405
 - Publications
http://www.visoa.bc.ca/?post_type=product

Questions...???



Questions wake people up. They prompt new ideas. They show people new places, new ways of doing things.

Michael Marquardt

Thank you!

Please remember to fill out your evaluation forms and hand them in before you leave!

