

# The High- Performance Strata Playbook

*Operations. Partnership.  
Transparency. Alignment.*

## Well-run strata communities share common patterns.

Insurance discussions are clear. Financial planning is structured. Roles between committee and manager are well understood. Decisions are documented with context.

This Playbook outlines the structural elements commonly seen in high-performing strata partnerships.

Use it as a guide for discussion at your next committee meeting.

**OPERATIONS**

**PARTNERSHIP**

**TRANSPARENCY**

**ALIGNMENT**

# OPERATIONS

*Day-to-day management is where the partnership is felt most directly.*

# Requests are Acknowledged & Actioned

The lived experience of strata management is largely defined by responsiveness. Owners and committee members should be able to raise issues and receive timely, clear updates, without having to follow up repeatedly. In a well-run partnership, requests don't fall through the cracks or get lost in inboxes

*In a high-performance partnership, response timeframes are defined, communicated to owners, and consistently met - outside of email threads and inboxes.*

## Signals to be aware of:

- Requests are acknowledged slowly or inconsistently.
- Owners report needing to chase the manager for updates.
- No clear process exists for logging or tracking maintenance requests.
- tasks are tracked in email threads.

## Questions to raise at your next meeting

1

What is the expected timeframe for acknowledging owner requests?

2

How are open requests tracked and reported to the committee?

3

Can owners see the status of their requests without calling?

# Contractor Standards are Clear & Consistent

The quality of day-to-day maintenance depends on how contractors are selected, instructed and followed up. In effective partnerships, contractors are vetted and insured, quotes are obtained appropriately, and works are confirmed complete, allowing for timely payment.



*Committees should know who is attending their building, why, and what the outcome was, without needing to ask.*

## Signals to be aware of:

- Contractors are engaged without committee visibility or approval thresholds.
- Works are initiated but completion is not confirmed or reported.
- The same issues recur without root cause being addressed.

## Questions to raise at your next meeting

- 1 How are contractors vetted and approved for our building?
- 2 What triggers a quote process versus a direct instruction?
- 3 How are completed works confirmed and reported back to the committee?

# Owner Communication is Proactive, Not Reactive

Owner confidence is built through consistent, well-timed communication. Routine updates, well organised and run AGMs, and site issues are communicated from a central point via a purpose-built platform.

## Routine Updates

Owners are kept informed without needing to ask.

## AGM Preparation

Notices, financials and agendas delivered on time.

## Issue Notification

Complaints are acknowledged and closed out clearly.

### Signals to be aware of:

- Owners frequently contact committee members directly with unresolved issues.
- AGM documents is late or without sufficient context.
- Communication is reactive – owners hear about issues after the fact and via inconsistent channels.

### Questions to raise at your next meeting

- 1 How are owners kept informed between formal meetings?
- 2 What is the process for notifying owners of important site information and updates?
- 3 Are AGM documents consistently delivered within required timeframes?

# PARTNERSHIP

*Strong outcomes are built on clarity of roles and structured collaboration.*

# Insurance Discussions are Strategic & Transparent

Insurance is often one of the most significant budget items in a strata community. Effective partnerships ensure renewal discussions include explanation of premium drivers, claims history, excess positioning and remuneration structure.

## Signals to be aware of:

- Renewal conversations are brief or primarily price-focused.
- Claims history is not reviewed in context.
- Remuneration details are not clearly documented.

## Questions to raise at your next meeting

- 1 What factors most influenced this year's premium?
- 2 How does our claims profile shape future positioning?
- 3 Is our strata manager receiving any commission, fee or referral, and is it clearly disclosed?

# Maintenance Planning & Financial Strategy are Connected

Sinking fund forecasting, levy planning and preventative maintenance operate together. When maintenance scheduling is integrated with funding strategy, financial conversations remain structured and predictable. Asset lifecycle awareness informs budgeting decisions.



## Signals to be aware of:

- Capital works forecasts are not referenced during budget discussions.
- Levy movements are not linked to long-term works planning.
- Recurring maintenance tasks do not have a valid service contract in place

## Questions to raise at your next meeting

- 1 How does our sinking fund forecast inform levy planning?
- 2 Do you have a contract and building compliance register?
- 3 Do we have the planned preventative maintenance schedule?

PART THREE

# TRANSPARENCY

*Clarity supports confidence  
across the community.*

Section 7-9

# Incentive Structures are Clearly Understood

Remuneration structures influence long-term positioning. In strong partnerships, the committee understands how management is remunerated across all arrangements, from insurance commission and contractor referrals to common ownership of service providers and how that structure aligns with the building's financial interests.

COMMISSION-BASED	COMMISSION-FREE
Remuneration linked to contract or premium outcomes	Remuneration fixed and disclosed
Incentives embedded across service arrangements	0% commission retained
Incentive partially tied to contractor or insurance selection	Incentive aligned to building outcomes

## Questions to raise at your next meeting

- 1 How are you remunerated on our insurance placement?
- 2 Have all incentives and referral arrangements been correctly disclosed?
- 3 Have alternative providers or contractors been considered?
- 4 Do you have a written disclosure of all fees, commissions and referral arrangements?

# Financial Reporting Enables Clear Oversight

The executive committee should receive three core reports from their strata manager as standard practice. Together they provide a complete picture of the corporation's financial position.



## Monthly Financial Report

Tracks income, expenditure and budget variance each month.



## Arrears Report

Identifies levy arrears and outstanding owner balances.



## Investment Account Statement

Confirms sinking fund balance, interest and account activity.

### Signals to be aware of:

- Monthly reports are not provided as standard practice.
- Levy arrears are not discussed at committee meetings.
- Sinking fund investment activity is not reported or visible.

### Questions to raise at your next meeting

- 1 Do we receive a monthly financial reporting pack?
- 2 How are levy arrears currently tracked and reported?
- 3 Can we see the current sinking fund investment account balance and activity?

# Decisions are Recorded With Context

Clear documentation supports informed deliberation and continuity. Recording the reasoning behind decisions - not just the outcome, creates a structured reference point that protects the committee over time.



## Meeting Minutes

Decisions are documented with the context and reasoning behind them, not just the outcome.



## Financial Decisions

Major expenditure and levy decisions are recorded with supporting rationale for future reference.



## Insurance Placements

Insurance selection decisions are documented in detail including alternatives considered.

### Signals to be aware of:

- Historical financial decisions are difficult to locate.
- Minutes record outcomes but not the reasoning behind them.

## Questions to raise at your next meeting

1

Are minutes capturing the reasoning behind key financial decisions?

2

Can we ensure insurance placement decisions are documented in detail?

3

How are major committee decisions stored and made accessible to incoming members?

# ALIGNMENT

*Strong alignment supports  
long-term stability.*

# Structured Reviews Keep Alignment on Track

Risk oversight and periodic comparison strengthen perspective. Committees benefit from structured review of compliance registers, contractor standards and financial performance.

1

## Compliance Registers

Reviewed regularly to confirm all obligations are current and documented.

2

## Financial Benchmarking

Structures compared periodically to confirm competitiveness and alignment.

3

## Contract Review

Major contracts reviewed at structured intervals for performance and value.

### **Signals to be aware of.**

*No contract register · No compliance register · Insurance not recently benchmarked · Major contracts continuing without review*

## QUESTIONS TO RAISE AT YOUR NEXT MEETING

1

Can we review the current building compliance register?

2

When was our budget structure last benchmarked?

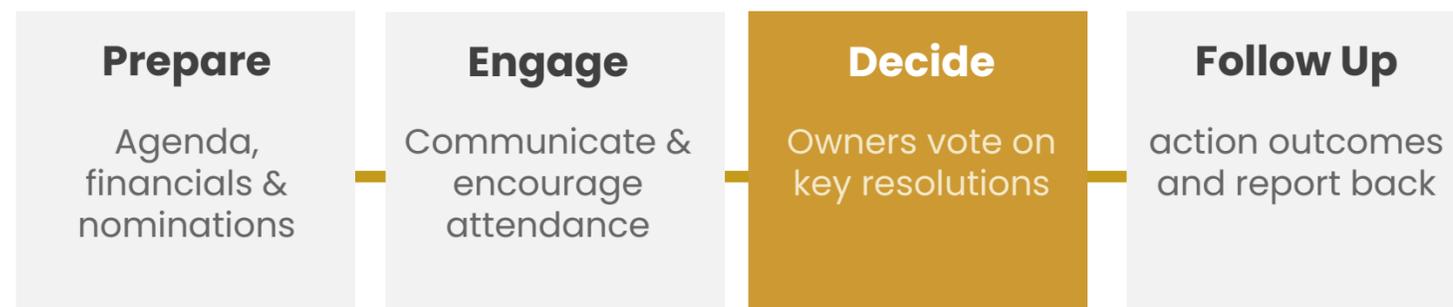
3

Are we actioning items on our sinking fund forecast as they fall due?

# Owner Alignment Starts at the AGM

The Annual General Meeting is the single most important event in the strata calendar. It is where owners vote on financial decisions, building direction and levy budgets. The higher the rate of participation, the more aligned the owners corporation, and the more robust the decision-making process becomes.

Many owners view the AGM as a procedural obligation rather than a tool for managing their asset and community. A high-performing strata partnership works to change that - making the AGM an event owners want to attend.



## Signals to be aware of:

- AGM has not been held within the prescribed legislative timeframe.
- Owner participation is consistently low with no strategy to improve it.

## The Partnership Behind the AGM

A high-performing strata partnership treats the AGM as an event, not a procedural obligation. When owners understand the effort, preparation and follow-through involved, trust in the partnership deepens.



### Advance Planning

AGM preparation begins 3 months out — agenda, financials, nominations and owner communications.



### Owner Engagement

Owners are actively encouraged to attend, understand the agenda and participate in decisions.



### Post-AGM Follow Through

Resolutions are actioned promptly and outcomes are communicated back to all owners.



### Committee Alignment

The executive committee and strata manager enter the AGM aligned on key decisions and priorities.

## Questions to raise at your next meeting

- When was our last AGM held and is it within the required timeframe?
- What is our current owner participation rate and how can we improve it?

# VANTAGE STRATA

---

Commission-free strata management.  
Built for committees that want better.

Operations

Partnership

Transparency

Alignment

## Ready for a Partnership Review?

High-performance strata partnerships are built on clarity, structure and alignment across day-to-day operations, finances and governance.

When committees oversee with awareness and managers advise with transparency, buildings benefit from steadier financial planning, more responsive management and stronger owner confidence.

[REQUEST A STRATA REVIEW](#)

*A confidential partnership review can provide additional perspective on insurance structure, remuneration alignment, financial transparency and operational standards.*