

Your Smart Checklist for Managing a Condo or Strata Community

Whether you manage a small 12-unit building or a 120-unit high-rise, use this checklist to make sure your community is running smoothly, efficiently, and stress-free.

1. Governance & Board Management

- ☐ Ensure your **board roles are clearly defined** (President, Treasurer, Secretary, etc.)
- ☐ Schedule **regular board meetings** with agendas and minutes
- ☐ Review and update your **community bylaws and policies**
- ☐ Implement **board training or orientation** for new members
- ☐ Maintain **transparent communication with owners**

2. Financial Management

- ☐ Maintain an **up-to-date budget** and track expenses
- ☐ Set aside **reserve funds for major repairs**
- ☐ Ensure **timely collection of condo fees**
- ☐ Conduct **annual financial audits or reviews**
- ☐ Use **digital tools** to track and report finances. If you are a client, [download the Converge App.](#)

3. Maintenance & Operations

- ☐ Keep a **preventive maintenance calendar** for all building systems
- ☐ Schedule **regular inspections** (HVAC, plumbing, elevators, roofing)

- ☐ Track **vendor performance and contracts**
- ☐ Plan **seasonal maintenance tasks** (snow removal, landscaping, cleaning)
- ☐ Have a **maintenance request system** for residents

4. Legal & Risk Management

- ☐ Ensure **insurance coverage** is up-to-date and adequate
- ☐ Review **legal obligations and compliance** (provincial/federal)
- ☐ Maintain records of **incidents and resolutions**
- ☐ Have a **plan for emergency situations** (fire, flood, power outage)

5. Community & Communication

- ☐ Implement a **resident communication plan** (email, newsletter, portal)
- ☐ Track **resident concerns and feedback**
- ☐ Host **annual or semi-annual community meetings**
- ☐ Use **digital platforms or apps** for community engagement
- ☐ Foster **neighborly initiatives** (clean-ups, social events)

6. Tools & Technology

- ☐ Use **digital dashboards** for finances, maintenance, and communications
- ☐ Implement **document storage and record-keeping** systems
- ☐ Track **vendor management and contracts online**
- ☐ Utilize **reporting tools** for board accountability
- ☐ Explore **energy efficiency and sustainability programs**

Want a smarter, turnkey system for your building?

Converge can help you implement every item on this checklist — customized to your building size and needs. From small communities to large, we provide the tools, programs, and support to make your community management easier and more efficient. [Request a proposal today.](#)