



TRAINING COURSE

CARETAKER PERFORMANCE MANAGEMENT AUDIT (CPMA)

How To Avoid Failing Your Caretaker
Performance Management Audit

www.stratamastery.com.au

Strata Mastery Trainers & Consultants

Helping Building Managers, Committee
Members, Letting Agents & Property Investors
To Take Control Of Your Investment





STRATA MASTERY

Body Corporate & Management
Rights Training Specialists

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How can we help you?

Caretaker Performance Management Audit (CPMA) Training Course

Failing a Caretaker Performance Management Audit can have serious consequences for Managers. This includes the issuing of a 'Default Notice' or 'Remedial Action Notice' (RAN), while serious enough breaches may lead to termination of the contract, ultimately causing a loss of capital assets.


So what are performance management audit triggers? Caretaker audits typically arise in circumstances where a discrepancy has developed between management and a body corporate/committee, or there has been a perceived decline in the overall standard or condition of common property, for example, cleaning and gardening maintenance standards, by-law mis-management, or instances where caretaking contract related complaints or disputes have gone unresolved.



A disgruntled body corporate committee, will engage independent legal counsel or seek advice from industry associates. Inevitably, an independent audit or close assessment of caretaking performance with management agreement “schedule of duties” will ensue.

Strata Mastery offers specialist training and support to Managers and Committee Members. Training courses are 100% customisable, site-specific and made as simple as possible through: offering audit training at short-notice where necessary, conducting Australia wide, on-site or video conference link training and providing you with the skills and knowhow to resolve existing non-compliances and avoid future issues.

Strata Mastery has a 100% success rate of helping its students to perform exceptionally well in their Caretaker Performance Management Audits. Training is available for those facing an impending assessment as well as managers seeking to impress a body corporate committee and ensure that their performance complies with the relevant regulations.



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Who would benefit from Strata Mastery CPMA courses?

- ✓ Caretakers pending a Performance Management Audit/Assessment
- ✓ Caretakers on the receiving end of a Performance Management Audit/Report or RAN (Remedial Actions Notice)
- ✓ Caretakers in conflict with the Body Corporate Committee who wish to ensure that Caretaking Service Agreement and State Building Statutory Requirements are met



- ✓ **Caretakers seeking a 'top up' of Management Rights term and wishing to impress a Body Corporate Committee through exceptional performance delivery**
- ✓ **Property Developers looking to introduce/implement/operate Management Rights**
- ✓ **Executive and Ordinary Committee Members who are responsible for supervising and monitoring the performance of the Caretaker/Service Contractors**
- ✓ **Self-Managing Bodies Corporate who are responsible to assume various building management responsibilities on behalf of all Lot Owners. This is relevant where there is an absence of Management Rights**
- ✓ **New Buyers of Management Rights looking to invest well, understand strata risks and acquire the necessary skills to demonstrate competency around body corporate legislative obligations and wishing to impress Committees during the assignment interview process**

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Strata Mastery

Caretaker Performance Management Audit (CPMA) Training Course

Strata Mastery are independent experts in providing body corporate and management rights training through fully customised, hands-on training and assistance to Managers and Committee Members. This training ensures compliance with an upcoming audit while also benefiting proactive Managers in elevating their performance standards. Understanding your management contract is essential to avoiding problems with fellow Lot Owners and Committee Members. Service agreements are often unclear or lack sufficient detail on the required performance standards.

We can help Managers to accurately deliver on caretaking contract requirements.





Strata Mastery offers 1, 2 and 3 day training courses in a mapped-out, simple and accessible format. These can be arranged at short notice for those facing a Caretaker Performance Management Audit Notice or Report, as well as for Managers wishing to ensure 100% compliance as a precautionary measure to avoid a future unanticipated audit. All courses are site-specific, contract specific and takes into account individual student industry experience and competency levels.

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A black and white photograph of a woman with long dark hair and glasses, smiling broadly. She is wearing a white button-down shirt. In the background, a group of people are cheering with their arms raised. The image is partially overlaid with a red diagonal shape in the top right corner and a solid red horizontal bar at the bottom.

Course Modules

1

DAY 1: BUILDING COMPLIANCE 101 (BC101)

Developing your understanding of Australian, state-specific building compliance statutory requirements. Including: building infrastructure and asset management, WHS/OHS Act, Australian Standards, Electrical Safety Act, Building Act, Pool Safety Standards etc.

Helping you to understand your caretaking service contract obligations. Including: Body Corporate versus Caretaker building repair and maintenance responsibilities, cleaning and gardening performance standards, requirements for supervising service contractors, minor works contract obligations and by-law breach management duties.

Developing your understanding of Workplace Health and Safety statutory obligations and risk management requirements of the Body Corporate and Caretakers or Building Managers.

2

DAY 2: BODY CORPORATE BEST PRACTICE (BCBP)

Developing your understanding of site-specific body corporate and management rights legislative responsibilities with particular attention to the BCCM Act and associated Regulations.

Developing your understanding of the roles and responsibilities of industry stakeholders, especially: Caretakers, Committees, Body Corporate Managers, Property Managers or Letting Agents, Service Contractors and Government Regulators.

Learning how to arrange body corporate committee meetings in compliance with legislation. This may include: policy implementation and execution skills development, performance management and financial management.

3

DAY 3: REGULATORY COMPLIANCE VIA SELF ASSESSMENT (RCviaSA)

Learning how to 'self-audit'. Developing your understanding of regulatory compliance via self-assessment, including COVID-19 requirements.

Learning how to prepare a site-specific 'Building Management Report' that complies with legislation.

Developing your conflict resolution skills.



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Strata Mastery Quality Assurance

Our five-time award winning trainers are independent industry experts whose expertise allows us to deliver on any caretaking agreement requirements.

Strata Mastery are committed to helping you thrive in this industry and have proven our consistency through our 100% success rate of helping students perform exceptionally well in their Caretaker Performance Management Audits.

Strata Mastery Difference

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All training sessions are:

- Fully customised to your needs. All training is 100% site-specific, 100% service contract specific, and 100% scheme document and record specific
- We come to you! All training is conducted on-site
- Training is one-on-one or in corporate groups as requested
- Client support and training for all urgent client requests is available 7 days a week
- Workshops are kept strictly confidential
- Trainers are independent industry experts
- Graduates of the Caretaker Performance Management Audit course, also receive 'Platinum Club Membership' which provides a complimentary 12-month subscription and access to over 100+ body corporate and management rights operational tools.

This includes: sample compliance motions, policies, office operational templates and forms. These management tools comply with all relevant acts and regulations applicable to the body corporate and management rights sector.

Subscription Value: **\$910.80** Inclusive of GST

For further information, please visit Strata Mastery's website
www.stratamastery.com.au

Why do Caretaker Performance Management Audits arise?

Caretaker Performance Management Audits typically arise where a discrepancy has developed between management and a body corporate committee, or where there has been a perceived decline in the overall standard of common property.

Common causes include:

- A decline in cleaning and gardening maintenance standards
- By-law mismanagement
- Instances where caretaking contract related complaints or disputes are unresolved

At the peak of their frustrations, many disgruntled body corporate committees seek independent legal counsel or advice from industry associates. This process inevitably leads to an independent audit or close assessment of caretaking performance, involving close scrutiny of the 'schedule of duties' in the management agreement. These audits are often conducted by specialist companies like: 'Diverse FMX', 'Seymour Consulting', 'Danny Little of MRAS Consulting' or 'Leary & Partners'.

Telltale warning signs of a disgruntled body corporate committee include:

- Repeated and/or ongoing complaints directed against the building manager;
- Sudden micro-management by voting committee members;
- Body Corporate meetings convened with the exclusion of building managers;
- Committee resolutions/motions being passed authorising the appointment of legal counsel; where serious discussions concerning the performance of the building manager have previously occurred.

What happens during a Caretaker Performance Management Audit?

The Assessor conducts a comprehensive inspection of the common property including all building infrastructure. Assessors also check workplace health and safety compliance management plans, and may conduct a 'desktop' audit of all building maintenance records. Detailed photographic evidence of any identified noncompliances during the inspection will follow and any confirmed breaches may escalate to the issuance of one or a series of RANs (Remedial Action Notices).

What are the consequences of a poor Caretaker Performance Management Audit?

A Caretaker Performance Management Audit or Assessment Report will be issued containing items that must be addressed, usually within a set timeframe. Severe infringement notices and penalties apply where the body corporate scheme is found non-compliant with various fire safety regulations, mechanical systems maintenance requirements, relevant Australian Standards and site-specific codes of practices. These may take the form of a 'Default Notice' or 'Remedial Action Notice' (RAN). It is essential that all identified non-compliances are rectified within the set timeframe; especially before a breach causes incident or injury.

What are the legal consequences of receiving a 'Default Notice' or 'RAN' (Remedial Action Notice)?

Building Managers cannot transfer, assign or sell management rights where there is an outstanding RAN or 'Default Notice' issued upon them. Such breach notices are very serious and the issues contained within it must be resolved appropriately. A breach notice contains a list of items that must be addressed, and failure to address any one of the concerns raised within the specified timeframe may lead to the body corporate committee calling a general meeting (AGM or EGM) to terminate the Manager's rights or contract. This process often involves lengthy and expensive administrative and legal proceedings, causing difficulties and costs for all stakeholders. The greater the number of breaches, the greater the risk to managers. The only solution is through ensuring full compliance ahead of time and to continue to implement compliant strategies moving forwards.

How can a Building Manager best avoid a Caretaker Performance Management Audit?

Audits and Assessments are best avoided wherever possible. It is imperative that Building Managers acquire an accurate understanding of site-specific caretaking agreement duties, legislative requirements and building compliance responsibilities. Strata Mastery's 1, 2 and 3 day site-specific training courses make acquiring this knowledge straightforward. Managers who enrol on the Strata Mastery Caretaker Performance Management Audit Training Course ahead of time, can be confident that they are fulfilling their Caretaking Agreement and Building Compliance obligations, and that their rights and contracts are secure.

Managers also benefit commercially from gaining technical knowledge through site-specific one-on-one training sessions. Clarification is given on the differing roles and responsibilities of the caretaker and body corporate which helps to avoid unnecessary legal and administrative costs for all stakeholders. Through gaining site-specific, non-confrontational guidance on your caretaking contracts and understanding and fulfilling your statutory obligations, you can nurture good practices while mitigating the risk of a Caretaker Performance Management Audit.

Testimonials

BACKGROUND: Experienced owners of management rights were initially surprised by being served with a 'Diverse FMX' Caretaker Performance Management Audit Notice, and turned to Strata Mastery training as an initial precaution. We helped them to identify and remedy all non-compliances before the audit, allowing them to pass their assessment.

“ I have made many investments throughout my career but Strata Mastery - Caretaker's Performance Management Audit Training Program, is one of the best and certainly worthwhile programs I have enrolled in. Not only did I gain knowledge and insight into areas I didn't even know existed, the fully customised training program has made my work so much easier as a Building Manager. I would love to refer Strata Mastery to anyone who works in our industry ”

LILY JIA

BACKGROUND: These high performing Managers were becoming frustrated by their 'ill-informed' body corporate committee. Following notification of a pending 'Diverse FMX' Caretaker Performance Management Audit, Directors wanted to ensure their team members were fully compliant. Their Strata Mastery training exposed numerous breaches but these were quickly rectified and the Managers excelled in their performance audit.

“ We learnt a lot within a short period of time, especially what was performed right, and, what was performed incorrectly, and certainly what we must deliver in the future to ensure the best possible outcome in our role as Building Managers. Upon completion of the training course, my husband and I engaged Stephanie Yun, on a casual consultancy basis to help us, to meet our contractual obligations and ultimately to achieve a positive assessment/audit result. We value Stephanie's genuine appreciation of our (highly critical) situation as well as her passion to assist on all statutory compliance matters. ”

**GOLD COAST
MULTIPLE MANAGEMENT RIGHTS OWNERS**

BACKGROUND: Managers of a townhouse development wanted to meet escalating committee expectations. Owners of management rights received just 7 days notice of a pending performance management audit, and so Strata Mastery responded quickly, providing practical assistance in order to ensure full compliance.

“ Stephanie's response was immediate and she went out of her way to accommodate pressing compliance deadlines... She delivered on her promises and improved our technical knowledge base significantly within a matter of days! Her enthusiasm and willingness to share her knowledge, industry resources and office/management tools to help my wife and I to solve our problems in a timely and efficient manner, made everything so easy. I highly recommend the services of 'Strata Mastery'... I believe Stephanie Yun's in-depth knowledge and personal commitment would greatly assist those in need. ”

SIMON & TERESA NGAI

BACKGROUND: New Managers of a multistorey holiday-let development were seeking independent advice and training on site-specific contract requirements, including 'in contract' versus 'outside contract' caretaking services and charges. Managers wanted to achieve a fair, just and equitable outcome, and so adopted a proactive approach to remove the threat of a potential audit.

“ Stephanie and the program were incredible. We learnt so much within a short period of time... It helps promote good relations between both parties which is something that we've been striving for since beginning this tenure. We have no hesitation in recommending Strata Mastery as an essential training exercise for Managers to keep up with current legislation and expectations. ”

JASON & LOUISE AGNEW



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