

A.I. ...

Do we even care?

...why is it useful in strata?

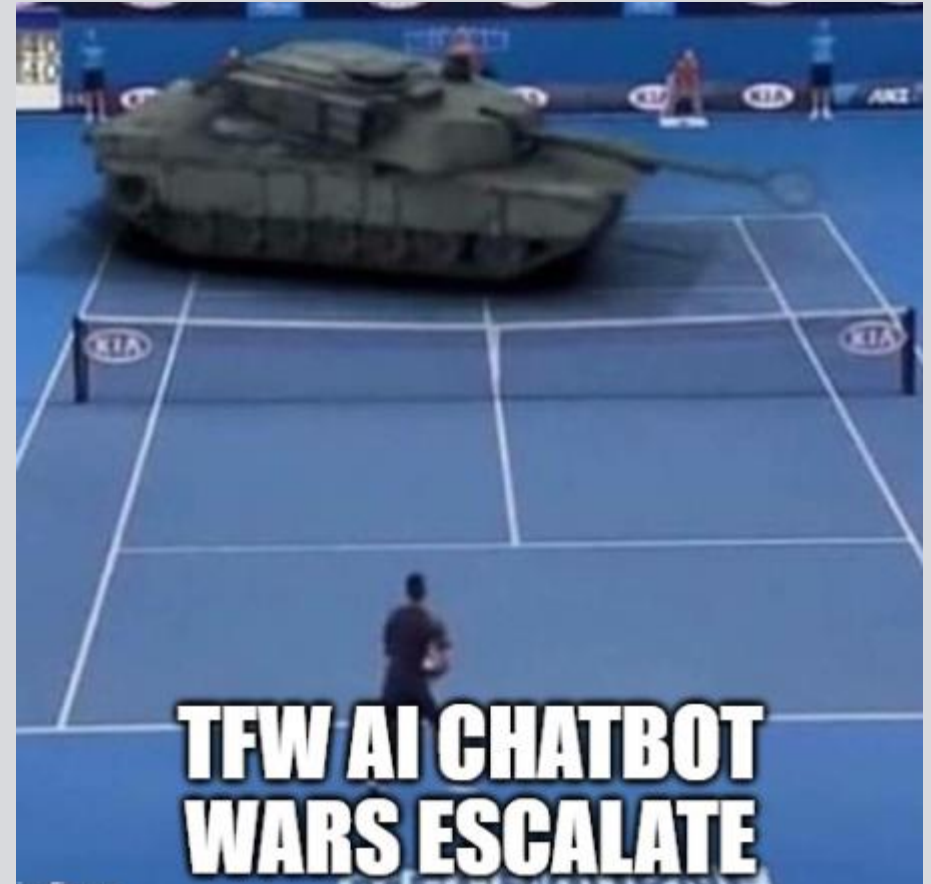


Disclaimer:

Data security.

Product agnostic.

Email tennis.



Common pain points:

Timing of responses.

Accuracy of responses.

Action timelines.

Workload volume.



Functional.

Gets the job done.

Limited bells and  
whistles.

Only as much horsepower  
as the driver.



Functional.

Gets the job done.

All the bells and whistles.

As much horsepower as  
you want.

The driver is no longer  
the engine.





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Think of the manager as the driver or navigator, not the engine.

Whether as a management employee, or committee working with a management company, the output is limited by time more than it is limited by expertise.

The prime targets for improvement in service delivery and workplace efficiency, work-life balance via AI are those actions that have consistent data input, consistent structured output, and don't require judgement calls every step along the way.



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Minutes.  
Agendas.  
Meeting reports.  
Filing documents.  
Quote/tender summaries.  
Quotes, work orders follow-up.  
Cashflow, financial and action tracking dashboards.



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**SAMPLE DOCUMENT**  
This is a *generic* set of committee meeting minutes prepared by SOCM, reproduced with all identifying information removed. Property addresses, plan number, owners corporation identifiers, committee members, owners, lot numbers, contractors, broker, insurer and facilities manager have been de-identified. The substance, resolutions, figures and action tracking are outlined. Provided as a sample of SOCM's committee minutes for the purposes of this tender only.

## MINUTES OF COMMITTEE MEETING

Owners Corporation 1 & Owners Corporation 2 – The Property

(Address withheld)

| MEETING DETAILS    |                                                                    |
|--------------------|--------------------------------------------------------------------|
| Date of Notice     | 11.08.2026                                                         |
| Owners Corporation | Owners Corporation 1 & Owners Corporation 2 (Plan No. PS XXXXXXXX) |
| Property Address   | (Address withheld)                                                 |
| Date of Meeting    | 17.08.2026                                                         |
| Time               | 6:00pm – 8:31pm                                                    |
| Venue              | Onsite – residents' dining room, (Address withheld)                |

## 1. ATTENDANCE / PROXIES / QUORUM

### 1.1 Members in Attendance

| NAME               | ROLE                                   |
|--------------------|----------------------------------------|
| Committee Member A | Chairperson, Owners Corporation 1      |
| Committee Member B | Chairperson, Owners Corporation 2      |
| Committee Member C | Member                                 |
| Committee Member D | Member                                 |
| Committee Member E | Member (sight-neg during this meeting) |

### NOTES

Committee Member B participated by video conference from overseas.

Committee Members F, G and H resigned from the Committees of Owners Corporation 1 and Owners Corporation 2 on 17.08.2026, effective immediately. Committee Member H also resigned from the Committee of a further owners corporation at the property. Each Committee then stood at four (4) members. Committee Member E was co-opted to the casual vacancy as each of Owners Corporation 1 and Owners Corporation 2 by electronic ballot, the majority being reached at 6.04pm on 17.08.2026 during this meeting. Refer to item 4.2. Committee Member E joined the meeting at 6.40pm.

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### 1.2 Proxies

No proxies were given.

### 1.3 Additional Attendees

- OC Manager – SOCM
- Assistant Manager – SOCM
- The Facilities Manager – in attendance from 6.00pm to 6.45pm for the facilities management items.
- A solicitor of the Owners Corporation's legal advisers (the Solicitors) – joined the meeting at 6.40pm and departed at 8.35pm.

### 1.4 Apologies

No apologies were given.

### 1.5 Quorum

A quorum was declared for each of Owners Corporation 1 and Owners Corporation 2.

## 2. CHAIRPERSON OF THE MEETING

*Explanatory note: the person appointed to chair the meeting will ensure it progresses to complete the agenda within the allotted timeframe of the meeting. Any items not considered by the conclusion of the allotted timeframe will be deferred to the following meeting. The meeting chairperson will manage the discussion and voting upon matters in a reasonable manner. The meeting chairperson will, if required, receive members from the meeting due to conflict of interest, or behaviour within the meeting, and so not any reveal in the minutes.*

### Resolution – Owners Corporation 1 & Owners Corporation 2

That the Committee appoints the OC Manager as the Chairperson of the Committee Meeting.

### Motion carried.

In Favour – 4 (Committee Members A, B, C and D)  
Against – 0  
Abstain – 0

## 3. FACILITIES MANAGEMENT

*Explanatory note: the Facilities Manager will present to this item and allow time to fifteen (10–15) minutes, followed by ten to fifteen (10–15) minutes of questions from the Committee. The Facilities Manager will then exit the meeting, and the Committee will vote separately upon the items requiring a decision, or defer any item it considers requires further information. This gives members the opportunity to determine whether they wish to proceed to a vote or to consider further questions, and maximises engagement time with the Facilities Manager.*

### 3.1 Facilities Management Report – Owners Corporation 1 & Owners Corporation 2

- Refer to the monthly facilities management report for July 2026 prepared by the Facilities Manager dated 05.08.2026, and to the Building Manager's Meeting Pack dated 18.08.2026, copies of which are attached to the meeting agenda.

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### Resolution – Owners Corporation 1 & Owners Corporation 2

That the monthly facilities management report is tabled and accepted, and queries without notice are received for response by the facilities manager.

### Motion carried.

In Favour – 4 (Committee Members A, B, C and D)  
Against – 0  
Abstain – 0

### NOTES

The Facilities Manager presented to the item and the Committee put queries to the facilities manager without notice.

### 3.2 Expenditure Summary – Owners Corporation 1 & Owners Corporation 2

- Refer to the Building Manager's Meeting Pack dated 18.08.2026 for a summary of expenditure incurred under the current Owners Corporation 1 and Owners Corporation 2 delegation limits since the previous Committee Meeting.

Expenditure incurred under the Owners Corporation 1 and Owners Corporation 2 delegations since the previous Committee Meeting, as recorded in the Building Manager's Meeting Pack dated 18.08.2026:

| OC | DATE       | DESCRIPTION                                                                                 | SUPPLIER                 | AMOUNT (EXCL GST) | DELEGATION / STATUS                                             |
|----|------------|---------------------------------------------------------------------------------------------|--------------------------|-------------------|-----------------------------------------------------------------|
| 1  | 17.07.2026 | Annual height safety system testing and certification (2026–2027)                           | Height Safety Contractor | \$4,920.00        | Building Manager – completed                                    |
| 1  | 23.07.2026 | Secondary street gas replacement – provide security and traffic coordination                | Security Contractor      | Pending Service   | Owners Corporation Manager – completed                          |
| 1  | 26.07.2026 | Supply and install signage – secondary street fire exit doors                               | Signage Contractor       | \$206.70          | Building Manager – completed                                    |
| 2  | 30.07.2026 | Quote #2080 – supply and install replacement carriage rollers for water Reservoir 1.2       | Pool Contractor          | \$330.00          | OC approved – completed                                         |
| 2  | 30.07.2026 | Quote #2081 – supply and install facility water switch submersed for indoor spa auto top up | Pool Contractor          | \$350.00          | OC approved – completed                                         |
| 2  | 30.07.2026 | Quote #2086 – install pool, outdoor spa and indoor spa remote monitoring upgrade            | Pool Contractor          | \$11,380.00       | Resolution of OC2, Committee Meeting 17.07.2026 – parts ordered |
| 2  | 30.07.2026 | Quote #2088 Rent A – supply water testing kit                                               | Pool Contractor          | \$2,155.00        | Resolution of OC2, Committee Meeting 17.07.2026 – parts ordered |
| 2  | 26.07.2026 | Quote #2089 – provide roof plot pool operation training (per hour)                          | Pool Contractor          | Pending Service   | Resolution of OC2, Committee Meeting 17.07.2026 – parts ordered |
| 1  | 31.07.2026 | Quote #2104 – supply and install new pressure unit/s, fire pump/s                           | Fire Services Contractor | \$1,000.00        | OC approved – completed                                         |
| 1  | 04.08.2026 | Investigate and repair – water leaking to the corner of the health club toilet              | Plumbing Contractor      | \$620.00          | Owners Corporation Manager – completed                          |

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| OC | DATE       | DESCRIPTION                                                                                                                   | SUPPLIER            | AMOUNT (EXCL GST) | DELEGATION / STATUS                                             |
|----|------------|-------------------------------------------------------------------------------------------------------------------------------|---------------------|-------------------|-----------------------------------------------------------------|
| 1  | 04.08.2026 | Install temporary basement flood pump                                                                                         | Plumbing Contractor | \$1,294.14        | Owners Corporation Manager – completed                          |
| 2  | 05.08.2026 | Staircase monitor up on Tuesday 11 August 2026                                                                                | Pool Contractor     | Pending Service   | OC approved – scheduled 11.08.2026                              |
| 1  | 05.08.2026 | Quote #2106 – replace the bag filter in the air handling unit servicing Building 1, 2 and 3                                   | HVAC Contractor     | \$1,238.00        | Owners Corporation Manager – parts ordered                      |
| 1  | 05.08.2026 | Quote #2107 – clean the supply air fan for the air park, and/or partially restricted by build-up on the under air grille mesh | HVAC Contractor     | \$1,964.00        | Owners Corporation Manager – parts ordered                      |
| 1  | 04.08.2026 | Quote #21014 – assist with security and monitoring and install IR-36-101-00                                                   | LDR Contractor      | \$4,480.00        | Owners Corporation Manager, urgent needs delegation – completed |

- The Manager notes that the Building Manager's Meeting Pack records the height safety testing amount as "\$1,920". It is presented above as \$3,920.00 and is to be confirmed against the invoice.
- Pool Contractor quotes #2080, #23361 Rev A and #2080 were approved by resolution of Owners Corporation 2 at the Committee Meeting held 27.07.2026 in the total sum of \$14,435.00 plus GST.

### NOTES

The Committee noted the summary of expenditure incurred under the Owners Corporation 1 and Owners Corporation 2 delegations since the previous Committee Meeting, as recorded in the Building Manager's Meeting Pack dated 18.08.2026.

The Delegation / Status column records the position that approved each item of expenditure, or the meeting at which it was resolved. "Owners Corporation Manager" denotes approval under the Owners Corporation Manager's delegation, "Building Manager" denotes approval under the Building Manager's delegation, and "OC approved" denotes approval by the Owners Corporation.

Further delegations exercised and reported to this meeting included the following. The Manager escalated the Basement 3 point of discharge matter to the Solicitors under his delegation as Owners Corporation Manager, and authorised the Building Manager to engage a contractor under the Building Manager's delegation in relation to the electrical fault to the Basement 3 pump controller – refer to item 9.1. The Manager accepted the gas retailer's offer beyond his delegated authority – refer to item 8.5. The Manager advised that the installation of the pool monitoring equipment will need to be paused pending works related to the rectification of defects.

### 3.3 Items Seeking Approval – Owners Corporation 1 & Owners Corporation 2

- Refer to the Building Manager's Meeting Pack dated 18.08.2026 for the list of items requiring Committee consideration, and to the quotes and supporting documentation attached to the meeting notice.

### GYM EQUIPMENT SERVICE MAINTENANCE – OWNERS CORPORATION 1

- Refer to the Gym Equipment Service Agreement provided by the Gym Equipment Supplier, the manufacturer of the installed gym equipment, a copy of which is attached to the meeting notice (Meeting Pack reference 5490). The Building Manager has recorded the cost as \$6,269.64 for a term of twenty-four (24) months.

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### Motion – Owners Corporation 1

That the Owners Corporation:

- Engages the Gym Equipment Supplier in accordance with the Gym Equipment Service Agreement, in the sum of \$6,269.64 plus GST, for the servicing of the gym equipment for a term of twenty-four (24) months.
- Delegates authority to the Chairperson to sign any contracts or agreements on behalf of the Owners Corporation in relation to these services, and.
- Authorises SOCM to issue any work orders and pay any invoices relating to these services on behalf of the Owners Corporation.

### Motion defeated.

In Favour – 0  
Against – 4 (Committee Members A, B, C and D)  
Abstain – 0

### NOTES

The Committee was unanimous that the engagement not proceed, considering that the cost of the service agreement far outweighed the actual cost of servicing and replacement parts.

### BIKE STORAGE CASE DOORS – REPLACEMENT AND SECURITY UPGRADE – OWNERS CORPORATION 1

- Refer to the quotes attached to the meeting notice (Meeting Pack reference 5389) for the replacement of two (2) bike storage case doors and the associated security upgrade. The works comprise two separate engagements: Contractor A for the replacement doors, and the Access Control Contractor for the PDR card readers and associated electronics.

| COMPONENT                                                                                      | SUPPLIER                  | PER DOOR   | TWO (2) DOORS |
|------------------------------------------------------------------------------------------------|---------------------------|------------|---------------|
| Replacement bike storage case door                                                             | Contractor A              | \$2,402.50 | \$4,805.00    |
| Access control – PDR card readers, maglocks, break glass units, REX helmet and door controller | Access Control Contractor | \$3,389.20 | \$6,778.40    |
| CCTV cameras                                                                                   | Access Control Contractor | \$1,094.11 | \$2,188.22    |
| Total                                                                                          |                           | \$6,885.81 | \$12,771.62   |

- The Building Manager has advised that PDR readers must be sourced through the Access Control Contractor as supplier of the existing access control system, and has recorded the status of the electronics as "pending further OC review".
- The Committee is to note that the engagement of Contractor A in accordance with quote 9245 dated 07.07.2026, in the sum of \$4,805.00 plus GST, to upgrade two (2) secure bike storage room doors was resolved at the Committee Meeting held 27.07.2026, and is retained below for completeness together with the electronics.

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- Minutes - ironically take hours.
- Disputes over wording.
- Document formatting (also know as Bill Gates Purgatory).
- Consistency across different managers or different firms.
- Inefficient meetings.
- Inefficient office hours.

Michael Teys (completely paraphrased):

‘There are AI products out there that do minutes faster and better than anything a manager can come close to.’

## Cashflow Projection

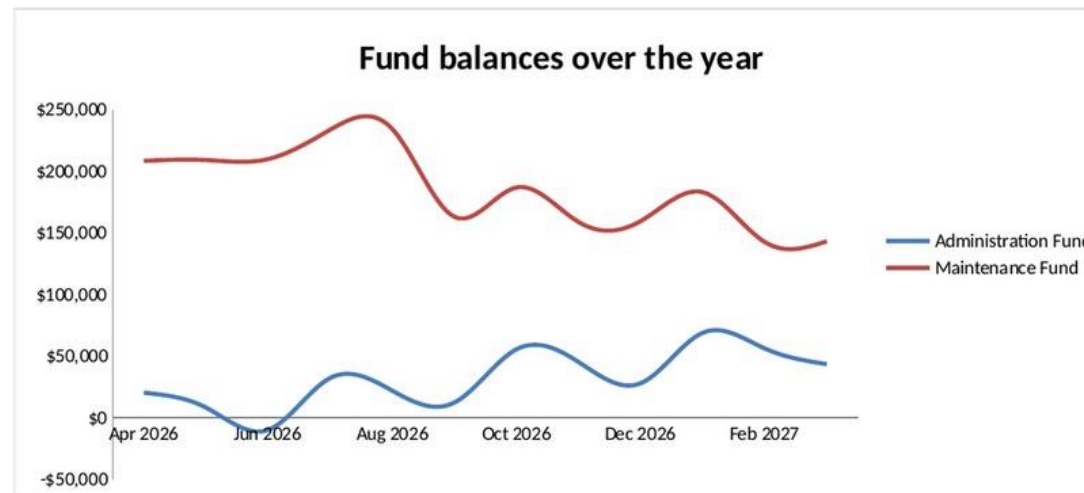
Sample OC — 12 Example St

Projection: 12 months, anchored from FY start | balances as at 01 Apr 2026

| Administration Fund      |                  | Maintenance Fund               |                   |
|--------------------------|------------------|--------------------------------|-------------------|
| Opening balance          | \$47,250         | Opening balance                | \$184,600         |
| Levies in (window)       | \$230,400        | Levies in (window)             | \$92,160          |
| Operating out (window)   | (\$235,500)      | Operating out (window)         | -                 |
| Capital out (window)     | -                | Capital out (window)           | (\$141,500)       |
| <b>Net movement</b>      | <b>(\$5,100)</b> | <b>Net movement</b>            | <b>(\$49,340)</b> |
| <b>Projected closing</b> | <b>\$43,468</b>  | <b>Projected closing</b>       | <b>\$143,024</b>  |
| Lowest point (window)    | (\$9,917)        | Lowest point (window)          | \$142,537         |
| COMBINED POSITION        |                  |                                |                   |
| <b>Total opening</b>     | <b>\$231,850</b> | <b>Total projected closing</b> | <b>\$186,492</b>  |

Headline figures recalculate live when Inputs change. Lowest point is the within-window trough from the Operating Cashflow running balance.

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## 1. EXECUTIVE SUMMARY

Owners Corporation A closed at \$93,637.52 and is projected to trough at \$28,976.14 in October 2026. Owners Corporation B closed at (\$36,999.14) and is projected to run negative in two months, reaching (\$48,214.60) in October. Both recover only on the November levy. Six decisions are required. 34 actions are open, of which 7 are ongoing; arrears total \$81,068.78 over 37 lots.

### DECISIONS AND APPROVALS REQUIRED

| Ref | Matter                               | Decision required                                                                                                                            | Status                      |
|-----|--------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------|
| D1  | Maintenance fund levy, OC B (2.5)    | Recommend Option 1 (\$125,787.00 incl. GST) or Option 2 (\$251,574.00 incl. GST) to the annual general meeting.                              | AWAITING COMMITTEE DECISION |
| D2  | OC B liquidity, Oct and Jan (2.5)    | Resolve how the two negative months are met: a repayable transfer from the maintenance fund, an earlier third instalment, or a special levy. | AWAITING COMMITTEE DECISION |
| D3  | Insurance renewal funding (7.1)      | Approve how the April 2027 renewal is funded: budget \$411,845.00, expected premium about \$488,000.00, shortfall about \$76,155.00.         | AWAITING COMMITTEE DECISION |
| D4  | Facilities management contract (6)   | Approve issue of the default notices under the building management agreement and both cleaning contracts, and the legal costs.               | AWAITING COMMITTEE DECISION |
| D5  | Landscaping tender, OC B (6)         | Approve award of the landscaping contract on completion of the tender, against \$40,000.00 plus GST a year.                                  | AWAITING COMMITTEE DECISION |
| D6  | Facade and window cleaning, OC A (4) | Approve one of six tenders, \$50,740.00 to \$114,200.00 plus GST, against \$70,000.00 budgeted.                                              | AWAITING COMMITTEE DECISION |

### ESCALATIONS

- Facilities management has moved from performance monitoring to contractual default. The contractor has instructed solicitors; a contingent liability is disclosed. Section 6.
- The builder has a final opportunity to rectify the outdoor spa, which the consultant finds requires full replacement. The spa remains closed. Section 4.
- A blocked discharge point and a failed stormwater pump are on a temporary pump, ownership disputed. Section 4.



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Managers are not experts in all technical aspects.

Different quotes and tenders work to internal goalposts, true apple-for-apple comparisons are rare.

Small details matter — insurance, GST/ABN/licensing, pricing variations



## TENDER COMPARISON — EXECUTIVE SUMMARY

Lift Maintenance Services — Merrivale Rise, 118 Aldenbury Street, Kewterton VIC (SAMPLE DOCUMENT)

Prepared by State Owners Corp (SOCM) | Submissions assessed: Verrick Vertical, Cobalt & Meade, Ashgrove Elevator Co. | 28 August 2026 | FORMAT SAMPLE — ILLUSTRATIVE DATA

### 1. Executive Summary

**This is a format sample.** The contractors, the property, the figures and the contract terms in this document are invented for demonstration purposes. No party named here is a real company and no figure reflects a real tender. The document is issued to show the structure and analytical method SOCM applies to a tender comparison, not to inform any decision.

Three submissions have been received for the maintenance of five lifts at Merrivale Rise — four passenger lifts serving levels G to 18 and one goods lift serving the loading dock to level 18. **Verrick Vertical Pty Ltd** quotes a fixed monthly fee for the whole site. **Cobalt & Meade Lift Services Pty Ltd** quotes per lift per month. **Ashgrove Elevator Co. Pty Ltd** quotes per visit per lift. The three headline figures are therefore not comparable as written, and have been normalised to an annual basis before any conclusion is drawn.

On core servicing alone the spread looks decisive — \$16,800 to \$49,800 per annum. Once statutory inspections, callout attendance and parts are brought onto a common footing, the gap between the three narrows to under \$8,000 across a comparable year. The headline price is the least reliable figure in these submissions.

**Sample document — read before use:** All parties, prices, dates and contract terms are fictitious and were created to demonstrate SOCM's tender comparison format. Nothing in this document is advice, and it is not derived from any real tender, property or contractor.

### 2. Comparison at a Glance

The submissions are compared below on a common annual basis. Where a submission quotes on a different unit, the normalised figure is shown with the quoted basis in brackets. Annual figures exclude GST.

| Criterion                 | Verrick Vertical Pty Ltd                                        | Cobalt & Meade Lift Services Pty Ltd                          | Ashgrove Elevator Co. Pty Ltd                        |
|---------------------------|-----------------------------------------------------------------|---------------------------------------------------------------|------------------------------------------------------|
| Pricing basis (as quoted) | Fixed monthly, whole of site<br>\$4,150 / month, all five lifts | Per lift, per month<br>\$795 passenger lift; \$610 goods lift | Per visit, per lift<br>\$560 per lift per attendance |



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Why does this matter?

Time.