

# WORKFLOW CLARITY CHECK

Clarity at the Point of Work.

✔ Use at the point of execution.  
Not after the fact.

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## TASK INITIATION

Task / Request: \_\_\_\_\_

Origin:

- Board Directive
- Management
- Committee Recommendation
- Resident Request

Property / Unit: \_\_\_\_\_

Date Initiated: \_\_\_\_\_

- No existing resolution  
(may require Board review)

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## AUTHORITY CHECK

Does this require Board decision?

- Exceeds approved spending threshold: \$ \_\_\_\_\_
- Not included in approved budget
- Policy exception required
- New vendor / contract approval
- Scope change from approved direction
- No governing resolution exists
- Legal or compliance implications



**IF YES: BOARD ACTION REQUIRED**

Meeting Date: \_\_\_\_\_

Resolution / Date Adopted: \_\_\_\_\_


Decision Summary: \_\_\_\_\_

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## EXECUTION PATH

Work proceeds based on:

- Approved Board direction / resolution
- Defined scope and budget
- Established policies

 Any scope change returns to Authority Check



## MANAGEMENT AUTHORITY CONFIRMATION

- Within approved budget
- Within manager spending authority
- Aligned with existing policy
- Covered by existing Board resolution
- Within previously approved scope

 **EXECUTION REMAINS WITH MANAGEMENT**

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## CLOSE & RECORD



Ensure all documentation is filed and recorded according to association record-keeping policies.

Recorded By: \_\_\_\_\_

Date Closed: \_\_\_\_\_

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## "COMPLETE" CHECK

- Scope aligned with approval
- Documentation attached
- Vendor / pricing confirmed
- Insurance / compliance verified
- Board approval documented (if required)

Completion Date: \_\_\_\_\_

Verified By: \_\_\_\_\_



Clear authority. Clean execution. **Fewer delays.**