



# Strata Gal's Field Notes

## 20 QUESTIONS FOR HIRING A BROKERAGE (+ SCORECARD)

Important note before you begin... this is not a substitute for legal advice. When things get spicy, call a lawyer!

### FIT + STYLE

1. Describe your management style in 10 words.  
*If they can't, they don't have one. Listen for clarity vs. marketing cr@p.*
2. What kind of strata are you the best fit for, and what kind are you the worst fit for?  
*This filters out "we can do anything" sales language. Good firms know their limits.*
3. What do you need from council for this relationship to work well?  
*This tests whether they see the relationship as a partnership vs. a service fantasy.*
4. What do you do when council wants something risky, unethical, or likely illegal?  
*Spine check. You're hiring judgment, not compliance.*

### CAPACITY + STABILITY

5. How many stratas and doors does the assigned manager currently manage?  
*Ask for numbers. Caseload predicts response time and service level.*
6. What support staff exists behind the manager (admin/accounting/assistants)?  
*If the manager does everything, you'll feel it. Support structure makes the service reality.*
7. What happens when our manager is away, sick, or quits? Who takes over and how fast?  
*Continuity plan. Most councils don't ask until disaster hits.*
8. What is your average manager tenure and turnover rate over the last two years?  
*Turnover = future disruption, record loss, relationship reset, and cost.*

### MONEY + CONFLICTS

9. Do you accept any referral fees, contractor user fees, rebates, commissions, or other benefits from vendors connected to our strata?  
*Yes/no. If they answer like a politician, that's your answer.*
10. If yes, how is it disclosed and where is it documented?  
*If you can't find it in writing, it doesn't exist.*

11. Do you have preferred vendors? If so, why? and how do you prevent conflicts?  
*Preferred can mean "quality" OR "relationship." Make them prove which.*

12. Do you (or any affiliates) receive compensation through restoration or related services?  
*This is where incentives can quietly steer decisions. Councils need transparency.*

## **AUTHORITY + RISK**

13. What can you authorize without council approval, and where is that spelled out in the agreement?  
*This prevents surprise spending. Don't accept vague answers.*

14. How do you document council instructions and approvals so the strata is protected later?  
*If it's informal, it will bite you. Documentation is liability protection.*

15. Walk us through your first 24 hours in a real emergency (flood/fire/security).  
*Listen for triage + documentation + spending authority + communication.*

16. When do you tell council to get legal advice, and how do you frame risk to reduce liability?  
*The best managers don't just react; they manage risk proactively.*

## **SYSTEMS + SERVICE**

17. What systems do you use to track tasks, requests, and deadlines (ticketing/project management)?  
*Silo'ed email and tech stack are both indicators that manager experience isn't considered.*

18. What is your response-time standard, and what counts as a response?  
*An autoreply that says "Thank you for your message!" is not service. Get clarity on expectations.*

19. What does a good council agenda look like for you? Can we see a sample?  
*If they won't show a sample or they don't have brokerage templates, that's a red flag.*

20. What's your 30/60/90-day transition plan, and what's the most common transition failure you've seen?  
*This tests honesty + experience.*

*More resources...*

[BCFSA.ca](https://bcfsa.ca) | [Working with a Strata Management Company](#)  
[CHOA.bc.ca](https://choa.bc.ca) | [What Is the Strata Managers Role](#)

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## BROKERAGE SCORECARD

This scorecard assesses governance risk and service reliability. Score based only on what was said or shown, and retain with council records.

Interview Date: \_\_\_\_\_  
Brokerage: \_\_\_\_\_  
Interviewers (Council): \_\_\_\_\_

5 = Clear, specific, documented; systems reduce risk and reliance on individuals  
4 = Mostly clear with minor gaps; manageable risk with light oversight  
3 = Mixed clarity; informal practices and 'it depends' answers  
2 = Vague or sales-driven; heavy reliance on trust or individuals  
1 = Evasive or contradictory; unclear authority, controls, or conflicts

### **FIT + STYLE** | Questions 1-4 | *Management style, self-awareness, ethical spine*

Score:  1  2  3  4  5

Notes:

### **CAPACITY + STABILITY** | Questions 5-8 | *Caseload, staffing support, continuity, turnover*

Score:  1  2  3  4  5

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### **MONEY + CONFLICT** | Questions 9-12 | *Referral fees, preferred vendors, disclosures*

Score:  1  2  3  4  5

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### **AUTHORITY + RISK** | Questions 13-16 | *Spending, documentation, emergencies, legal*

Score:  1  2  3  4  5

Notes:

### **SYSTEMS + SERVICE** | Questions 17-20 | *Tracking, response times, agendas, transition plan*

Score:  1  2  3  4  5

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## OVERALL ASSESSMENT

(\_\_\_\_ Total Points Earned ÷ 25) × 100 = Final Score ( \_\_\_\_ %)

100-90% = Strong values alignment; minimal trade-offs or added council burden  
89-80% = General alignment; known trade-offs require added council oversight  
79-70% = Partial alignment; material gaps increase council workload and risk  
Below 70% = Misalignment; ongoing governance strain and elevated risk likely