



MANAGEMENT SELECTION AND REVIEW CHECK LIST

Service Issue	Cana Management	Other Service Provider
<p><i>Can we get in touch quickly with our co-ordinator when they're not actually working in our co-op's office?</i></p>	<p>YES. Cana's receptionist, at our central office, can help you. If your co-ordinator isn't at Cana's office, we'll forward a message and your co-ordinator will get back to you as quickly as possible.</p>	
<p><i>If our co-ordinator is unavailable when we call, can we talk to someone who is familiar with our co-op and can help us?</i></p>	<p>YES. We have full-time senior advisors and consultants who know about each client's procedures and important issues.</p>	
<p><i>Can we quickly get up-to-date, accurate, and easy-to-use reports and forms when we need them and as often as we want them?</i></p> <p>ρ <i>Sign-in lists for general meetings?</i></p> <p>ρ <i>Phone lists?</i></p> <p>ρ <i>Lists of who lives in each unit?</i></p> <p>ρ <i>List of "principal", "joint", and "associate" members?</i></p> <p>ρ <i>Complete history of any member's charges and payments?</i></p> <p>ρ <i>Housing charge arrears reports telling how much members owe and giving detailed explanation of exactly why?</i></p>	<p>YES. We provide a wide variety of forms and reports <u>on demand</u>. They can be faxed immediately or delivered the next site day to those you've authorized to receive them.</p> <p>4 Yes. They are dated and tell you what the quorum is.</p> <p>4 Yes. They can be printed in unit order or alphabetically by member.</p> <p>4 Yes. Adults <u>and</u> children can be listed.</p> <p>4 Yes. It provides complete shareholder information.</p> <p>4 Yes. We provide a detailed month-by-month record of all transactions.</p> <p>4 Yes. We provide a list showing members names to those with confidential access and a list with members' names removed is also available. With each Board Report, we provide a detailed reconciliation of each balance owing.</p>	



MANAGEMENT SELECTION AND REVIEW CHECK LIST

<i>Continued</i>		
Service Issue	Cana Management	Other Service Provider
<p>ρ <i>Lists of transactions for each of our revenue and expense budget categories?</i></p> <p>ρ <i>Other forms and reports?</i></p>	<p>4 Yes. They're available, not only at budget time, but at any time throughout the year.</p> <p>4 Yes. Many other forms and reports are available.</p>	
<p><i>Are back-up copies of essential documents kept away from the co-op site for added safety and security?</i></p>	<p>YES. Copies of all important administrative correspondence, contracts, reports, financial data, and so on are kept at Cana's central office.</p>	
<p><i>Do we get accurate, detailed monthly financial reports?</i></p> <p>ρ <i>Are they easy to use?</i></p> <p>ρ <i>Do they provide complete information?</i></p>	<p>YES. Cana's financial reports were developed, and are updated and revised, based on feedback from our clients. Our statement package has become a standard for co-op housing financial reporting.</p> <p>4 Yes. And to help you use them even more effectively, we offer a "Reading Financial Statements" workshop.</p> <p>4 Yes. There's a convenient summary (including up-to-date bank balances), a revenue and expense statement (with comparisons to budget), a balance sheet, and lists of deposits and cheques. There's a report showing all revenues and expenses for each budget category and a special Maintenance Expense summary that compares each expense type to budget. Section 95 co-ops also receive a detailed two</p>	



MANAGEMENT SELECTION AND REVIEW CHECK LIST

<i>Continued</i>	page analysis of subsidy use.	
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ρ <i>Are they delivered to us <u>promptly</u> and <u>every month</u>?</i>	4 Yes. We give top priority to getting your financial statements to you quickly and consistently – each and every month.	
<i>Does our on-site co-ordinator receive direct supervision, on-going training, and support?</i>	YES. Your co-ordinator is part of a team. The whole team provides service to your co-op. Part of the team effort is to provide supervision of site work; in-service training (seminars, workshops, regular staff meetings, outside training); support from senior advisors, specialists, and consultants to help with difficult issues; and the mutual support of fellow workers.	
<i>Does our co-ordinator attend monthly Board meetings?</i>	YES. Your co-ordinator comes to the meetings <u>and</u> provides a detailed written report about current Board business.	
<i>Is coverage provided if our co-ordinator is away for vacations or is unable to work for extended periods?</i>	YES. Because your co-ordinator is part of a team, temporary coverage can be provided by other Cana staff members. Senior advisors and consultants are always available on short notice to help out.	
<i>Does our co-ordinator make up for any missed hours such as statutory holidays?</i>	YES. Missed hours are made up as quickly as possible.	
<i>Is it possible to request a change of co-ordinators without changing or compromising the quality of service?</i>	YES. We guarantee your satisfaction in all areas of the service we provide for you.	
<i>Can the level of service provided be</i>	YES. We have the staffing and ability	



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<i>increased or decreased quickly?</i>	to make changes as required.	
<i>Is it easy to terminate the service agreement?</i>	YES. Cana's service contract may be cancelled with 60 days written notice.	
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<i>Are there experienced personnel available to help and advise the Board with special problems such as termination proceedings?</i>	YES. "Extra services" can be provided by senior Cana representatives who can assist the Board with difficult issues like these. Telephone consultation with senior representatives is provided free of charge.	
<i>Are training or education workshops available?</i>	YES. Affordably-priced workshops, given by senior Cana staff, are available. Workshop guides and reference materials are provided to ALL participants at no extra charge. The workshops are delivered on-site, in your common room, to as many of your members who'd like to attend.	
<i>Is there help available for budget preparation?</i>	YES. Affordably-priced budget workshops or complete budget preparation services are available.	
<i>Is there help available for Annual General Meetings?</i>	YES. A senior Cana representative and your co-ordinator will attend to help with this important meeting. Cana will provide everything from sign-in sheets and ballots to vote-count tally sheets – even a ballot box.	
<i>Is there a long-term commitment to providing services to housing co-ops?</i>	YES. Cana has been working <u>exclusively</u> with housing co-ops since 1981. 90% of our staff have been with Cana for 5 years or more.	
<i>Can long-term client and business references be provided?</i>	YES. We're proud of the job we do. The majority of our clients have been	



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	with us since day one of their operation and more than 50% of our clients have been with us for 10 years or more.	
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<p><i>Is there a commitment to maintaining good professional relationships with co-op sector agencies and being active and informed about sector issues?</i></p> <p>ρ <i>Members of co-op organizations?</i></p> <p>ρ <i>Support the sector?</i></p> <p>ρ <i>Have good working relationships with important players in the sector?</i></p> <p>ρ <i>Involved with sector issues?</i></p>	<p>YES. Cana Management is committed to the co-op movement and works exclusively with housing co-ops.</p> <p>4 Yes. We're members of CHF Canada and CHF BC.</p> <p>4 Yes. We provide financial and other support to SCOOP, the CHF Canada co-op young leaders program, Camp Rainbow, the Co-operative Housing Disability Trust, and Rooftops Canada.</p> <p>4 Yes. We meet with, and maintain business relationships with, Canada Mortgage and Housing Corporation and B.C. Housing.</p> <p>4 Yes. Senior staff members have been involved in updating the Rules and Occupancy Agreement resulting from the new Co-op Act and active with the "Leaky Co-op" Committee.</p>	
<p><i>Are other services or programs provided to help us save money?</i></p> <p>ρ <i>Banking?</i></p>	<p>YES. We think helping our clients save money is important.</p> <p>4 Yes. Clients have the option of taking advantage of the Investment Pooling Banking System developed by Cana. There are no service</p>	



MANAGEMENT SELECTION AND REVIEW CHECK LIST

<i>Continued</i>	charges and a preferred interest rate on daily balances. No administration fees are charged and no memberships in other organizations are required.	
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ρ <i>Office services?</i>	4 Yes. We offer quality photocopying (including collating, stapling, and three-hole punching) at a very low cost. We also bulk purchase office supplies for our clients at their request.	
<i>Are fees guaranteed for a minimum period?</i>	YES. We don't have fee increases mandated in our contracts. Fees are increased only when absolutely required and not more often than once per year.	
<i>Are there any mandatory or additional annual costs – things like new contract set-up fees, purchasing an office computer or other specialized office equipment, memberships in other organizations, or annual audit preparation fees?</i>	NO.	
<i>Other issues important to our co-op:</i> ρ _____ ρ _____ ρ _____ ρ _____		



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