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BOARD MEETINGS

THE AI TOOLKIT FOR CONDO MANAGERS



CONDO INSPECT PRO
INSPECTION MANAGEMENT BUILT FOR CONDO PROFESSIONALS

**A Structured Workflow for Ontario
Condominium Managers**

**Developed by Sunni Dowds, OLCM
Founder, Condo Inspect Pro**



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Introduction

Preparing board meeting documentation is one of the most time-consuming responsibilities handled by condominium managers. Each board meeting requires the preparation of formal governance records that allow Directors to review operational matters and make informed decisions.

Typical board meeting packages include:

- the meeting agenda
- meeting minutes
- the management report
- contractor quotations
- inspection reports
- financial statements
- operational correspondence

These records must be accurate, organized, and professionally written because they form part of the official governance record of the condominium corporation.

This guide provides a structured workflow that allows condominium managers to use AI tools to assist with the preparation of these documents while maintaining the governance standards required under Ontario condominium legislation and professional practice.

The purpose of this guide is not to replace professional judgment. The purpose is to reduce administrative workload while ensuring that governance documentation remains clear, organized, and defensible.

Who This Toolkit Is For

This toolkit was developed for professionals involved in the governance and operational management of condominium corporations.

The guide is particularly intended for:

Licensed Condominium Managers who are responsible for preparing board meeting documentation, organizing board packages, and maintaining corporate records.

Property Management Companies seeking structured and repeatable processes for preparing governance documentation across multiple condominium corporations.

Board Members who wish to better understand how meeting documentation is prepared and how operational matters are presented for decision-making.

Administrative Staff who assist condominium managers with assembling board packages and preparing meeting materials.

The workflow presented in this guide reflects common governance practices used within the Ontario condominium sector. It demonstrates how structured processes and AI tools can assist with preparing documentation more efficiently while maintaining the standards expected of professional condominium management.

This guide assumes the reader has familiarity with condominium governance processes, including board meetings, contractor procurement, inspection reporting, and corporate record keeping.

How to Use This Toolkit Each Month

Condominium board documentation follows a recurring operational cycle. Each meeting builds on the records created at the previous meeting, and the documentation prepared for the upcoming meeting supports the Board's decision-making process.

Each meeting cycle follows these steps:

Step 1 — Prepare the Board Meeting Minutes

Following the meeting, the manager prepares the formal Board Meeting Minutes based on the meeting agenda, transcript or notes, and the Management Report presented during the meeting. The minutes become the official governance record of the meeting.

Step 2 — Prepare Vendor Quote Comparison Summaries

When contractor proposals are being reviewed by the Board, quote comparison summaries allow Directors to clearly understand the scope, pricing, and differences between proposals. These summaries are typically included in the board package for upcoming meetings.

Step 3 — Prepare the Next Board Meeting Agenda

The agenda for the next meeting is created by reviewing the previous meeting minutes, outstanding task items, operational matters requiring discussion, contractor proposals, inspection reports, and financial updates. Unresolved matters move forward to Unfinished Business, while new operational matters appear under New Business or Contracts.

Step 4 — Prepare the Management Report

The Management Report provides the operational context for the agenda. The report summarizes operational updates, contractor updates, financial context, building maintenance matters, and items requiring Board direction. The Management Report follows the same numbering structure as the agenda so Directors can easily follow the discussion during the meeting.

Step 5 — Assemble the Board Package

Once the agenda, management report, contractor summaries, and supporting documents are prepared, they are assembled into a single board meeting package. This package is circulated to Directors in advance of the meeting to allow them to review the materials and prepare for discussion.

Workflow Summary

Board Meeting Minutes ↓ Vendor Quote Comparison Summaries ↓ Board Meeting Agenda ↓ Management Report ↓ Board Meeting Package

Governance Context

Board meeting records are corporate governance documents. They must align with the following frameworks:

- The Condominium Act, 1998 (Ontario)
- Professional obligations under the CMRAO licensing framework
- Governance guidance from ACMO / CMAS
- Standard meeting procedure informed by Robert's Rules of Order

Meeting minutes, management reports, agendas, and supporting documentation must therefore be prepared in a manner that clearly records Board decisions and demonstrates reasonable diligence.

AI tools may assist in organizing information, but the manager remains responsible for reviewing and finalizing all governance records.

Why This Workflow Matters

Preparing a board meeting package requires reviewing multiple documents and ensuring continuity between meetings. Managers typically must:

- review meeting transcripts or notes
- identify unresolved matters from previous meetings
- organize contractor proposals
- prepare quote comparison summaries
- prepare the next meeting agenda
- prepare the management report
- assemble the board package

The workflow outlined in this guide mirrors the process used by experienced condominium managers and ensures that each document supports the preparation of the next.

Monthly Board Preparation Process

The workflow for preparing board documentation follows the sequence below.

1. Prepare Board Meeting Minutes from the meeting that has just occurred
2. Prepare Vendor Quote Comparison Summaries for upcoming decisions
3. Prepare the Board Meeting Agenda for the next meeting
4. Prepare the Management Report aligned with the agenda
5. Assemble the Board Meeting Package

Each of these steps is supported by prompts contained in this guide.

Organizing Board Meeting Documents

Managers should maintain a Board Preparation folder for each meeting, organized by year and meeting date.

Typical documents to place in this folder throughout the month include:

- contractor quotations
- engineering reports
- inspection reports
- financial statements
- correspondence requiring Board review
- meeting transcripts or notes
- photographs
- previous agendas and minutes

Maintaining a single location for meeting materials reduces preparation time and ensures that documents are not overlooked when assembling the board package.

Building the Board Package Using Adobe Acrobat

Many managers assemble the final board package using Adobe Acrobat. Before assembling the package, each document should be renamed to match the agenda numbering so files appear in the correct order.

Example File Naming

- 01 Agenda
- 02 Minutes of Previous Meeting
- 03 Management Report
- 08 a Quote Roof — Vendor A
- 08 b Quote Roof — Vendor B
- 09 a Engineering Report — Balcony Inspection

Step-by-Step Assembly

1. Ensure all meeting documents are saved in the Board Prep folder
2. Rename documents using the agenda numbering structure
3. Open Adobe Acrobat
4. Select Create > Combine Files
5. Drag all numbered files into the combine window in the correct order
6. Click Combine

This produces a single PDF board package. Adobe will automatically generate bookmarks based on the document names, allowing Directors to easily navigate between agenda items during the meeting.

Adding Page Numbers

1. Open Edit Document > Add Header and Footer
2. Add page numbering in the upper right corner using the format: BOD Pkg Page 1 of XX
3. Set page numbering to begin on page 2 so the agenda page remains unnumbered

Understanding the Standardized Agenda Structure

Many condominium corporations maintain a standardized agenda structure where the primary numbering remains consistent from meeting to meeting.

Typical Structure

1. Call to Order and Approval of the Agenda
2. Declaration of Conflicts of Interest
3. Minutes of the Previous Meeting and Matters Arising
4. Ratification of Interim Decisions
5. Financial Report
6. Correspondence
7. Shared Facilities (only if applicable)
8. Contracts
9. Unfinished Business
10. New Business
11. Reports
12. In-Camera Session
13. Date of Next Meeting and Adjournment

Agenda item 7 (Shared Facilities) should only appear where the condominium corporation participates in shared facility agreements or cost-sharing arrangements. If no shared facilities exist, this item should be removed entirely.

Sub-items appear as lettered subsections. Example:

- 9.a Fire Order — Deficiencies
- 9.b Bicycle Storage — Forms / Keys

How Unfinished Business Moves Between Meetings

When preparing the next agenda, the manager must review the previous meeting minutes and determine the status of each matter discussed.

- Matters that have been completed are removed from the agenda
- Matters that remain unresolved move to Unfinished Business
- Matters that were deferred remain listed and are marked Deferred in bold and italics
- New operational matters appear under New Business or Contracts

This ensures continuity between meetings and prevents operational matters from being lost.

Incorporating Building Inspection Data

Building inspections often identify operational issues that require follow-up or Board awareness.

Examples include:

- maintenance deficiencies
- building system issues
- contractor follow-up work
- reserve fund related repairs
- safety concerns

Inspection management platforms such as Condo Inspect Pro provide a structured way to document and track these observations.

Inspection records may include photographs, deficiency descriptions, location information, recommended follow-up actions, and status tracking. When inspections are recorded consistently, management can identify issues that require Board awareness or direction.

These matters can then be placed on the agenda under the appropriate section:

- unresolved issues may appear under Unfinished Business
- new issues may appear under New Business
- contractor work may appear under Contracts

This ensures that inspection findings become part of the formal governance process followed by the Board.

Using AI to Assist With Board Documentation

Document Attachment Instructions

Some AI platforms limit the number of documents that can be attached to a single prompt. Before attaching documents, use the following instruction:

Before completing the directions in this prompt allow me to attach a number of documents in several prompts and do not action until I advise the document attachment is complete.

Once documents are uploaded:

Document attachment is complete. Please proceed with the prompt instructions.

What AI Can and Cannot Do

Artificial intelligence tools can assist condominium managers with organizing and drafting governance documentation, but they do not replace the professional judgment required to prepare official corporate records.

AI Can Assist With

- organizing information from multiple documents
- structuring governance documentation in a consistent format
- summarizing operational updates and contractor proposals
- drafting initial versions of meeting minutes, agendas, and management reports
- reducing the time required to prepare recurring board documentation

AI Cannot

- verify the accuracy of operational information
- confirm that contractor pricing is correct
- determine whether confidential information should appear in public records
- ensure that governance decisions are recorded exactly as intended by the Board
- replace the professional responsibility of the condominium manager

The output produced by AI should always be treated as a draft starting point, not as a finalized governance document. The manager must review and refine all content before finalizing for circulation.

AI Prompt Workflow

Prompts must be used in the following sequence:

1. Board Meeting Minutes
2. Vendor Quote Comparison Summary
3. Board Meeting Agenda
4. Management Report

Minutes establish the outcome of the previous meeting. Quote summaries prepare decision materials. The agenda schedules matters requiring discussion. The management report provides operational context aligned with the agenda.

In my experience, this sequence produces the most organized and consistent board documentation. Each document builds directly on the previous one, which reduces the amount of information you need to re-enter and keeps the package coherent from start to finish. I have tested a number of approaches over the years and this is the format I return to consistently.

Using the Prompts in This Guide

Each prompt reflects a workflow used by experienced condominium managers when preparing meeting documentation. The response produced by an AI system should never be treated as the final document without review.

Typical adjustments after AI output is generated may include:

- correcting operational details
- confirming contractor names and pricing
- adjusting wording to reflect the discussion that occurred
- adding context that may not appear in transcripts or notes
- removing information that should remain confidential
- ensuring the document reflects the corporation's governance practices

AI should therefore be viewed as a drafting assistant, not a replacement for professional oversight.

Please note: The prompts in this guide are provided as a structured starting point based on my own professional practice. They are not guaranteed to produce a final, ready-to-use document without your input. Every corporation is different, and the output will always require your review, judgment, and refinement before it is circulated to the Board.

PROMPT SECTION

Use the following prompts in sequence. Review and refine all AI output before finalizing.

PROMPT 1 Board Meeting Minutes (Minutes of Previous Meeting)

Use this prompt after each Board meeting to prepare both the public minutes and the Private and Confidential In-Camera minutes.

You are preparing formal Board Meeting Minutes for an Ontario Condominium Corporation. Your task is to produce two documents from the meeting materials: 1. Public Board Meeting Minutes 2. Private and Confidential In-Camera Board Meeting Minutes The minutes must reflect governance standards expected of licensed condominium managers in Ontario and must comply with the Condominium Act, 1998. ----- PROCESS RULE Before drafting the minutes: 1. Review the meeting agenda. 2. Map transcript discussion to the correct agenda items. 3. Reorganize discussion so the minutes follow the agenda structure. Do NOT allow transcript order to determine the structure. The agenda controls the structure of the minutes. Every agenda item must appear in the minutes even if it was not discussed. ----- DISCUSSION MAPPING RULE Board meeting discussions often move between agenda items or return to earlier topics. When this occurs, map each discussion to the correct agenda item rather than the chronological order of the transcript. If a discussion returns to a previously listed agenda item later in the meeting, include the information under the original agenda item section. Do not create duplicate agenda sections. All discussion related to a specific agenda item must appear within that item's section of the minutes. ----- MINUTES DETAIL REQUIREMENT The minutes must contain sufficient operational detail for governance records. Do NOT summarize entire agenda sections into one sentence. Each agenda item must include: • concise discussion summary • contractor names if referenced • quoted amounts if referenced • operational updates if discussed • Board direction where applicable Operational items listed individually on the agenda must appear individually in the minutes. Do not combine multiple agenda items into one summary. ----- DEFERRED ITEMS If an agenda item was not reviewed at the meeting, record: "This item was not reviewed at this meeting and was deferred to the next meeting." ----- MOTION IDENTIFICATION RULE Record motions only where the Board clearly approves, directs, authorizes, or ratifies an action. Do not infer or create motions from general discussion. If no formal approval occurred, record the discussion and any action items but do not insert a motion. ----- CONTRACTOR QUOTES If contractor quotes are discussed, record them in list format. Example: a) ABC Engineering – engineering services – amount plus or including HST b) XYZ Mechanical – equipment replacement – amount plus or including HST c) DEF Contracting – repair work – amount plus or including HST ----- CONFIDENTIALITY CLASSIFICATION The following matters must be recorded in the In-Camera minutes instead of the public minutes: • references to specific unit numbers • arrears matters • enforcement matters

involving owners • legal advice or communication with legal counsel • litigation matters • HR or personnel matters • employee performance discussions • matters identifying an owner or resident If a unit number appears (example: Unit 104 or Unit 709), that discussion must be placed in the In-Camera minutes. ----- **PUBLIC MINUTES REQUIREMENTS**
Public minutes must include: • meeting header information • directors present, regrets, and guests • agenda structure • discussion summaries for non-confidential matters • contractor quotes where discussed • Board motions • action items When confidential matters occur, the public minutes must state only: "The Board moved In-Camera to discuss confidential matters relating to legal matters, personnel matters, and specific unit issues." No further detail may appear in the public minutes. ---
----- **MEETING HEADER FORMAT** *The Public Board Minutes must begin with a centered header block. All header lines must be bold and center aligned. Do not insert blank lines between the header lines. Header structure: Building Name Legal Corporation Name Minutes of the Board of Directors Meeting Held on Month Day, Year Meeting Format Meeting Time -*
----- **ATTENDANCE FORMAT** *Attendance labels must be bold and left aligned. PRESENT Director A – Position Director B – Position REGRETS Director D – Position GUESTS Name – Title – Organization Rules: • Section labels must be bold • Each attendee appears on its own line • Names must not appear on the same line as the label -----*
----- **FORMATTING REQUIREMENTS** *All agenda headings must be bold. Example: 1. Call to Order and Approval of the Agenda Subsections must also be bold. Example: 9.a Fire Order – Deficiencies Leave one blank line after each agenda heading. -----*
----- **MOTION FORMAT** *Motion: On a motion made by Director A and seconded by Director B, the Board approved the proposal from ABC Engineering in the amount of \$____ (plus or including HST). Carried by All. -----*
----- **ACTION ITEM FORMAT** *Action: Description of task assigned. -----*
----- **IN-CAMERA MINUTES** *Create a second document titled: PRIVATE AND CONFIDENTIAL IN-CAMERA BOARD MEETING MINUTES This document must record: • confidential discussions • operational context necessary for the Board • Board direction • motions passed during the In-Camera session -----*
----- **OUTPUT STRUCTURE** *Produce two clearly separated documents in the following order: PUBLIC BOARD MEETING MINUTES [full formatted public minutes] PRIVATE AND CONFIDENTIAL IN-CAMERA BOARD MEETING MINUTES [confidential minutes] -----*
----- **STYLE REQUIREMENTS** *The minutes must: • use professional condominium governance language • remain neutral and factual • avoid transcript wording • avoid commentary or speculation -----*
----- **OUTPUT CONTROL** *Return only the two documents requested. Do not include commentary, explanations, suggestions, or prompt advice.*

Export Prompt — Board Meeting Minutes

After you have reviewed and fixed any details you can then have AI export to your preferred format. If your preference is PDF then change any reference to (.docx) or Microsoft Word to your preferred format.

Export the previously generated minutes into two separate Microsoft Word documents (.docx). Do not rewrite, summarize, or modify any of the text. The content must remain exactly as previously generated. Preserve all formatting including: • centered header block • bold headings • bold agenda sections • bold italic motions • bold italic action items • spacing between sections Document formatting requirements: Paper size: Letter (8.5 x 11) Margins: 1 inch Font: Arial Font size: 11 pt Header block must remain centered. All remaining content must be left aligned. -----

----- DOCUMENT 1 Export the Public Board Meeting Minutes into a Word document. File name format: Minutes of BOD (Month Day, Year)_Draft.docx Include only the Public Board Meeting Minutes content. -----

DOCUMENT 2 Export the Private and Confidential minutes into a separate Word document. File name format: P&C In Camera BOD (Month Day, Year)_Draft.docx Include only the Private and Confidential In-Camera minutes content. -----

----- OUTPUT REQUIREMENT Return both files as downloadable .docx documents.

PROMPT 2 Vendor Quote Comparison Summary

Use this prompt when the Board is reviewing contractor proposals. Attach the contractor quotes before running the prompt.

You are preparing a Vendor Quote Comparison Summary for an Ontario Condominium Corporation. The summary will be included in a Board meeting package and must allow Directors to clearly compare contractor proposals in order to make an informed decision. -----

PURPOSE Create a Board-facing comparison summary of vendor proposals for a proposed project or service. The summary must clearly present the scope of work, deliverables, exclusions, warranties, and pricing differences between vendors. The goal is to provide a side-by-side comparison that allows the Board to easily understand the differences between proposals. -----

INPUT DOCUMENTS You will be provided with: • Contractor proposals or quotations • Scope descriptions • Supporting notes if available -----

PROJECT SUMMARY Begin with a short description explaining: • what the project or service involves • why the work is required • the building component, system, or service affected The description must be concise and suitable for inclusion in a Board management report. -----

SCOPE EXTRACTION RULE Review each proposal and extract the scope of work directly from the documents. Break the work into individual deliverables, components, or services. Each component must appear as its own row in the comparison table. Scope items must reflect the actual work described in the proposals and may vary depending on the type of contract. Do not rely on predefined examples. Extract scope elements exactly as described in the proposals. -----

SCOPE NORMALIZATION RULE Contractors often describe scope differently or bundle multiple tasks together. When proposals bundle work into a single description, break the scope into individual comparable components so the table allows accurate comparison. Example: If a proposal states "complete equipment replacement," break the scope into components such as: • equipment supply • removal of existing equipment • installation • commissioning • testing • cleanup Mark each component as Included for that contractor where applicable. -----

SCOPE COMPLETENESS RULE All scope items mentioned in any proposal must appear in the comparison table. If a scope item appears in only one contractor proposal, it must still appear as its own row. For other vendors mark: Not Included or Not Specified -----

COMPARISON TABLE STRUCTURE Create a single side-by-side comparison table. Column structure: Scope of Work | Contractor Name | Contractor Name | Contractor Name Use the actual contractor names from the proposals as column headers. If more vendors are provided, add additional columns. The first column lists the individual scope components. Each contractor column must indicate: Included / Not Included / Not Specified If additional detail exists, summarize briefly within the cell. Example: Included – 2 year warranty Included – quarterly service Included – engineering review -----

PRICING ROWS At the bottom of the same comparison table include pricing rows: Subtotal HST Total Indicate clearly whether the pricing is: plus HST or including HST

If a contractor does not provide a pricing breakdown write: Not Specified -----
----- SCOPE DIFFERENCE SUMMARY After the table provide a short explanation
highlighting key differences between proposals. Identify: • scope gaps • missing services •
additional inclusions • warranty differences • risk of additional costs -----
----- RECOMMENDATION Provide a professional recommendation for the Board. The
recommendation should consider: • completeness of scope • clarity of proposal • risk of additional
costs • overall project certainty Maintain a neutral governance tone appropriate for a Board report. -
----- STYLE REQUIREMENTS The summary must: • use
professional condominium governance language • remain factual and neutral • avoid marketing
language • present information clearly for Board decision making -----
---- OUTPUT CONTROL Return only the Vendor Quote Comparison Summary. Do not include
commentary, explanations, or prompt advice.

Export Prompt — Vendor Quote Summary

Export the previously generated Vendor Quote Comparison Summary into a Microsoft Word
document (.docx). Do not rewrite or modify any of the text. Preserve all formatting including: • table
structure • headings • spacing • vendor names • pricing rows Document formatting requirements:
Paper size: Letter (8.5 x 11) Margins: 1 inch Font: Arial Font size: 11 pt Title must appear at the top
of the document: Vendor Quote Comparison Summary The comparison table must remain intact.
File name format: Vendor Quote Comparison Summary (Project Name)_Draft.docx Example:
Vendor Quote Comparison Summary (Domestic Hot Water Tank Replacement)_Draft.docx Return
the document as a downloadable .docx file.

PROMPT 3 Board Meeting Agenda (Next Meeting)

Use this prompt after the minutes are finalized to prepare the agenda for the next meeting. Attach the previous minutes, task list, and any supporting documents before running.

You are preparing the next Board Meeting Agenda for an Ontario Condominium Corporation. The agenda will be included in the Board meeting package and must follow governance practices commonly used by licensed condominium managers in Ontario. -----

--- PURPOSE Create the next Board Meeting Agenda based on the previous meeting records and current operational matters. The agenda must maintain continuity between meetings and ensure that all matters requiring Board discussion or decision are properly scheduled. -----

----- INPUT DOCUMENTS You will be provided with some or all of the following: • Previous Board Meeting Agenda • Previous Board Meeting Minutes • Task List or Action Item Tracker • Inspection Reports • Vendor Quotes or Quote Summaries • Financial Statements • Operational Notes from Management • Supporting documents intended for the upcoming Board meeting package Review all provided documents before preparing the agenda. -----

----- AGENDA STRUCTURE RULE The structure of the new agenda must follow the numbering used in the previous meeting agenda. The previous agenda controls the numbering structure. Do not change the numbering order unless the previous agenda clearly requires it. Typical structure: 1. Call to Order and Approval of the Agenda 2. Declaration of Conflicts of Interest 3. Minutes of the Previous Meeting and Matters Arising 4. Ratification of Interim Decisions 5. Financial Report 6. Correspondence 7. Shared Facilities (only if applicable – otherwise remove this item) 8. Contracts 9. Unfinished Business 10. New Business 11. Reports 12. In-Camera Session 13. Date of Next Meeting and Adjournment Items 3 and 12 must always remain on the agenda. -----

----- CONTINUITY RULE Review the previous meeting minutes and determine the status of each matter discussed. Apply the following rules: • Matters completed since the last meeting must be removed from the agenda. • Matters that remain ongoing must move to Unfinished Business. • Matters that were deferred must remain on the agenda and be marked "Deferred". • Matters requiring Board approval or discussion should appear under Contracts or New Business depending on the nature of the item. Do not create agenda items that are not supported by the provided documents. -----

----- TASK LIST RULE Review the Task List or Action Tracker. Any items that remain incomplete must be scheduled on the agenda under the appropriate section. Examples: Operational or follow-up matters → Unfinished Business Contractor work or vendor proposals → Contracts New issues requiring Board discussion → New Business -----

----- ATTACHMENT REVIEW RULE Review any supporting documents that will be included in the Board package such as: • contractor quotations • engineering or inspection reports • incident reports • financial statements • legal correspondence If a document requires Board review or decision, create a corresponding agenda item. Examples: Contracts • Elevator Maintenance Contract Renewal • Domestic Hot Water Tank Repair Quotes New Business • Building System Investigation • Inspection Report Findings -----

----- **SUBSECTION FORMAT** Agenda subsections must follow the letter format. Example: 9.a Fire Order – Deficiencies 9.b Bicycle Storage – Forms / Keys 9.c Reserve Fund Project Each agenda item must be concise and descriptive. Use short operational titles that clearly identify the matter being discussed. Do not include long explanations. -----

----- **DEFERRED ITEMS RULE** If a matter was deferred at the previous meeting, retain it in the same section and clearly mark it as Deferred. Example: 9.b Legal Opinion – Rules Clause (Deferred) -----

----- **STYLE REQUIREMENTS** The agenda must: • be concise and professional • use short operational titles • avoid explanations or narrative • reflect standard condominium governance practices Each agenda item should be one short line. -----

----- **OUTPUT FORMAT** The final agenda must include: Corporation Name Title: Board Meeting Agenda Meeting Date Meeting Time Meeting Location or Virtual Platform Followed by the numbered agenda sections. -----

----- **OUTPUT CONTROL** Return only the completed Board Meeting Agenda. Do not include commentary, explanations, or prompt instructions.

Export Prompt — Board Meeting Agenda

Export the previously generated Board Meeting Agenda into a Microsoft Word document (.docx). Do not rewrite, summarize, or modify any of the text. The content must remain exactly as previously generated. Preserve all formatting including: • numbered agenda sections • lettered subsections • headings • spacing between sections Document formatting requirements: Paper size: Letter (8.5 x 11) Margins: 1 inch Font: Arial Font size: 11 pt The following lines must appear at the top of the document: Corporation Name Title: Board Meeting Agenda Meeting Date Meeting Time Meeting Location or Virtual Platform All agenda items must remain left aligned. -----

----- **FILE NAME** Use the following file name format: Board Meeting Agenda (Month Day, Year)_Draft.docx Example: Board Meeting Agenda (February 25, 2026)_Draft.docx -----

----- **OUTPUT REQUIREMENT** Return the agenda as a downloadable .docx document. Do not include commentary or explanations.

PROMPT 4 Management Report

Use this prompt after the agenda is finalized to prepare the Management Report. Attach the agenda, previous minutes, quote summaries, inspection reports, and financial statements before running.

You are preparing a Management Report for the Board of Directors of an Ontario Condominium Corporation. The report will be included in the Board meeting package and must provide operational updates and information required for Board decision making. The report must follow governance practices used by licensed condominium managers in Ontario and align with the Condominium Act, 1998. ----- PURPOSE Create a Management Report that supports the upcoming Board Meeting. The report must provide concise operational updates, financial context, contractor updates, and matters requiring Board direction. The report must follow the same numbering structure as the Board Meeting Agenda. ----- INPUT DOCUMENTS You will be provided with: • Board Meeting Agenda • Previous Board Meeting Minutes • Vendor Quote Summaries • Inspection Reports • Financial Statements • Operational Notes or Manager Updates ----- STRUCTURE RULE The Management Report must follow the agenda numbering exactly. Every agenda item must appear as its own section in the report even if no update exists. Do not renumber agenda items. Subsections must appear under the same section as they appear in the agenda. Example: 9. Unfinished Business 9.a Fire Order – Deficiencies 9.b Bicycle Storage – Forms / Keys ----- PREVIOUS MINUTES CONTINUITY RULE Review the previous meeting minutes and use them to: • identify matters arising from the prior meeting • identify interim decisions made since the last meeting • confirm unresolved matters that must continue under Unfinished Business • confirm items completed since the last meeting • maintain continuity between meetings For the section "Minutes of the Previous Meeting and Matters Arising", include wording such as: The minutes of the previous Board Meeting dated [Month Day, Year] have been circulated. Any corrections or matters arising will be addressed at the meeting. ----- RATIFICATION OF INTERIM DECISIONS For the section "Ratification of Interim Decisions", summarize any interim approvals made since the previous meeting. If none exist, state: There were no interim decisions requiring ratification. ----- CONTENT REQUIREMENTS Each agenda section must contain the relevant management update. Updates should include: • current status of the matter • actions taken by management • contractor or consultant updates • operational context • next steps if applicable Where no update exists, clearly state: No update at this time. ----- FINANCIAL REPORT SECTION Summarize key financial information including: • operating account balance • reserve fund balance • significant budget variances • notable receivables or arrears • major maintenance expenses The information must remain concise and factual. ----- CONTRACT AND QUOTE ITEMS Where vendor quotes or proposals are included in the Board package: • reference the quote comparison summary • briefly describe the work • indicate whether Board direction is required Example wording: Three quotations were obtained for the repair. A detailed comparison summary is included within the

Board package. Board direction is requested. ----- BOARD DECISION ITEMS Where Board approval is required, clearly indicate this. Example: For Board Direction. or Board approval required to proceed with contractor selection. -----

----- OPERATIONAL ITEMS For maintenance, engineering, or building system issues explain: • the issue • actions taken • recommended next steps The explanation must remain clear and concise. ----- STYLE REQUIREMENTS The Management Report must: • use professional condominium governance language • remain neutral and factual • avoid conversational language • avoid unnecessary narrative Updates should typically be one to three paragraphs. ----- OUTPUT FORMAT The report must include: Corporation Name Title: Management Report Board Meeting Date Meeting Format (virtual platform or location) Followed by the numbered agenda sections. -----

----- OUTPUT CONTROL Return only the Management Report. Do not include commentary, explanations, or prompt advice.

Export Prompt — Management Report

Export the previously generated Management Report into a Microsoft Word document (.docx). Do not rewrite, summarize, or modify any of the text. The content must remain exactly as previously generated. Preserve all formatting including: • numbered agenda sections • lettered subsections • headings • spacing between sections Document formatting requirements: Paper size: Letter (8.5 x 11) Margins: 1 inch Font: Arial Font size: 11 pt The header section must appear at the top of the document in the following order: Corporation Name Management Report Board Meeting Date Meeting Format (virtual platform or location) The header must remain left aligned. All numbered agenda sections and subsections must remain left aligned. -----

FILE NAME Use the following file name format: Management Report (Month Day, Year)_Draft.docx Example: Management Report (February 25, 2026)_Draft.docx -----

-- OUTPUT REQUIREMENT Return the Management Report as a downloadable .docx document. Do not include commentary or explanations.

About the Author

Sunni Dowds, OLCM

Founder, Condo Inspect Pro | Operations Manager, CIE Property Management & Consulting Inc.

This guide was developed by Sunni Dowds, a licensed condominium manager with more than two decades of experience working within Ontario's condominium sector.

Throughout her career, Sunni has worked closely with condominium boards, contractors, engineers, and property management teams to support the operational management of condominium corporations and ensure that governance records are prepared clearly, accurately, and in a manner that supports informed decision-making by Boards of Directors.

The workflow presented in this guide reflects the practical process used by experienced condominium managers when organizing board meeting materials and maintaining continuity between meetings.

Sunni is also the creator of Condo Inspect Pro, a platform designed to support condominium managers by standardizing building inspection processes and maintaining consistent, defensible inspection records.

By combining structured inspection data with organized governance documentation, condominium managers can better support Boards in understanding building conditions and making informed decisions about maintenance, repairs, and long-term asset planning.

Closing Thoughts

Preparing clear and accurate board meeting documentation is one of the most important governance responsibilities carried out within a condominium corporation.

Board agendas, management reports, contractor summaries, and meeting minutes form part of the official corporate record. These documents allow Directors to review operational matters, understand building conditions, evaluate contractor proposals, and make informed decisions on behalf of the community they represent.

What has changed is the ability to use modern tools, including AI, to assist with organizing and drafting documentation. When used properly, AI can help managers:

- organize large volumes of information
- structure governance documents more efficiently
- reduce drafting time for recurring documents
- maintain consistent formatting across meeting materials

However, AI remains only one tool within the process. The responsibility for reviewing, refining, and finalizing governance records always remains with the condominium manager.

By combining structured workflows, organized building data, and modern tools, condominium managers can significantly improve efficiency while maintaining the governance standards expected within the condominium sector.



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