Steward HOA

FOR THE BOARD PACKET

Steward Board Approval Kit

Proposal for a free, guided maintenance and records pilot

ASSOCIATION

RECORDS ISSUE TO ADDRESS

When a director or manager leaves, repair invoices, warranty terms and prior decisions can be hard to find. Steward connects the available records to each asset so current and future directors can see what was done and what needs attention.

What the pilot delivers

Start with one shared asset and include up to three if useful. The board receives a short summary of completed work, supporting records, unanswered questions and who will handle the next action.

Illustrative result for a pool pump

Documented	Replaced May 2025. Vendor and installation date appear on invoice #1048.
Still open	Warranty coverage is unconfirmed. The warranty certificate is missing.
Next action	The maintenance lead will ask the vendor for the certificate.

What Steward does

Organizes the available service records, vendor details and relevant decisions. Prepares the summary and helps confirm follow-ups.

What the association provides

Selects the asset, shares available records it authorizes Steward to use, and names one contact to confirm details and next steps.

Cost if the board chooses to continue

The guided pilot is free. Any subscription is a separate board decision.

1–20 UNITS	21–150 UNITS	151–300 UNITS	OVER 300 UNITS
Free	**$95/mo**	**$199/mo**	**Custom quote**

Save 10% when billed yearly. Yearly plans are invoiced once a year.

FOR THE BOARD MEETING

AGENDA ITEM

Review and vote on a free Steward pilot for maintenance records.

PROPOSED MOTION

“I move that the board approve a free guided Steward pilot for up to three shared assets, designate one board or management contact, and authorize sharing only the records the association approves for the pilot. The board will set a review date and consider any subscription separately after reviewing the results.”