

Scoring Matrix for Property & Operations Management Contract - Lake Jeanette Association, Inc.

Search Committee: Dixon Johnston, Jory Marino, Tom Weiss, Jim Blakeley

Each of the 4 Committee Members independently scored each finalist candidate - totals averaged

	Candidate B Slatter Mgt.	Candidate D	Candidate F
	Total Avg.	Total Avg.	Total Avg.
Scoring for Written Proposal Submitted 2 = Yes 1 = Partial Answer 0 = No			
Following instructions given by Board of Directors to submit Request for Proposal:	8	4	5
Yes = The Company followed the Board's request to submit a tailored proposal based on a unique Scope of Work.			
No = The Company submitted a boiler plate proposal that defined services they provide, but did not tailor their response to the defined Scope of Work.			
Written Communication Skills Revealed in RFP:	8	4	3
Yes = The Company's proposal presented a well thought out response with supporting information and represented the desired level of professionalism that one would expect to see in written communications to the Board of Directors, the membership, vendors, owners of the Lake, and City of Greensboro officials, etc.			
No = The Company's proposal did not provide supporting information either through work experience or PM credentials to show expertise in the PM field and did not represent a level of professionalism that one would expect to see in written communication skills required for this contract.			
Continuity of Services in Agent's Absence in RFP:	8	3	1
Yes = The Company's proposal represented skilled support staff and a commitment for support staff to remain abreast of the PM field and current activity relating to the contract in order to ensure continuity in work flow and services in times of sickness, vacation, etc. of the Agent.			
No = The Company's proposal did not represent sufficient skilled support staff, how they will learn and stay abreast of the current activities relating to the contract, or how they will learn and/or stay abreast of the PM field in order to provide continuity of services in the Agent's absence.			
Company - Scoring for In-Person Interviews 2 = Exceptional 1 = Acceptable 0 = Unacceptable			
How many years of experience managing an HOA or equivalently complex business?	8	0	0
Does the Company/Agent have vendor management experience?	8	5	6
Does the Company/Agent have the requisite certifications to qualify as an HOA manager and if not will they pursue these certifications?	8	3	4
Has the Company/Agent held increasingly more responsible roles to include managing teams as well as customer facing activities?	8	4	4
If the Company employs its staff, do they carry Workers Compensation and Business General Liability Insurance?	8	3	3
If the Company uses independent contractors do they obtain a Certificate of Insurance?	8	3	3
Agent - Scoring for In-Person Interviews 2 = Exceptional 1 = Acceptable 0 = Unacceptable			
Enthusiasm	8	7	6
Pro-active vs Reactive Management	8	6	1
Leadership Management	8	4	1
Governance Management	7	5	0
Financial Management	6	3	1
Insurance/Risk Management	6	5	0
Problem Solving	7	3	1
Communication/Flexibility/Adaptability	8	4	2
Customer Service	8	6	3
Technical Skills	6	3	4
Work Ethic	8	4	4
Did the Candidate Ask Questions	6	4	2
Total Score	158	83	54