

# GM QUALIFICATIONS

# SUDDEN VALLEY COMMUNITY ASSOCIATION

Announcement – September 2016

**Job Title::** General Manager

**Department:** Administration

**Location:** Administration Offices – Clubhouse

**Reports to:** President, Board of Directors

**Salary Range:**  
Depends on Qualifications

**Type of position:**  
Full Time

**Employee Classification:**  
Exempt

## Summary:

Serving at the pleasure of the Board of Directors (Board), the General Manager (GM) is the chief administrative officer of the Sudden Valley Community Association (SVCA). In that position he/she assumes the responsibility for the day-to-day management of all aspects of operation of SVCA and the supervision of staff, in accordance with SVCA's governing documents and policies.

The GM directs and oversees the management and insures the quality of all aspects of the Sudden Valley community, including golf course operations, golf concessions, turf and equipment maintenance, oversight of restaurant operations through an existing lease, the main pool and health club under an existing contract with the YMCA, and 24/7 community Security provided by a third party. *Marina?*

The GM directs and oversees community relations, relations with neighboring communities, contractor and vendor relations, resident concerns, Board relations as needed to promote good operating relationships and processes and to protect SVCA's reputation as a choice community. Excellence in customer service to the membership shall be expected in all interactions, both verbal and written, and the GM shall train and instill this same attitude in the entire staff.

The GM shall accept and maintain responsibility for the fiscal performance of all SVCA operations, and manages under a professional business model in order to achieve maximum financial efficiency for all areas of SVCA.

The GM shall utilize coaching and team building skills to unite and motivate employees and shall maintain:

- A positive, consistent, and impartial work environment
- An open communication system
- An employee recognition program established by a merit based system.

## Examples of Some Specific Duties and Responsibilities:

Duties and responsibilities, to be accomplished by self and through subordinate staff, include, but are not limited to, the following:

- Assumes the leadership and supervision of all SVCA's daily operation of departments and the routine affairs of the Association while maintaining open communication with the Board.
- Manages and oversees SVCA financial processes, including billings, escrows, payables, collections and budgets and guides the Board in their fiduciary responsibilities. Ensures that all bookkeeping and accounting systems operate under GAAP. Provides written monthly status, variance and outlook reports.
- Implements, ensures compliance with and operates SVCA under all Federal, State and local laws (including OSHA, ADA and other agencies) as well as the Association's Documents, and Board goals, directives, policies, procedures and resolutions.
- Inspires and models customer focused strategies and service in all communications and efforts ensuring a focused staff that places customers first.
- Fosters a customer-focused culture and maintains an active presence in the community. Ensures frequent and extensive communication with residents, through website, email, newsletters, meetings and other activities. Promotes resident participation in Association activities.

- Assures that all equipment, buildings and facilities are safe, clean, maintained and protected in a professional and responsible manner to ensure optimum life and operational efficiency.
- Establishes and implements short- and long-range organizational goals through overall strategic planning, objectives, policies, and operating procedures. Monitors and evaluates programmatic and operational effectiveness of SVCA services, including the Sudden Valley Golf Course, and effects ongoing quality and safety changes required for improvement. Participates in planning process and is responsible for implementation of Long Range Community plans, and reports on progress in this area regularly.
- Utilizes coaching and team building skills to unite, and motivate employees. Monitors morale and models attitudes that build teamwork and create a safe, positive, consistent, and impartial work environment and an open communication system.
- Reinforces all operational area standards through effective personnel training programs and scheduling.
- Negotiates and oversees contractors, vendors, suppliers and all providers of services and goods to the community to insure prompt response to issues, expected performance and compliance to contract specifications and governing standards.
- Communicates with government agencies and third parties on matters affecting the daily and long-term operations of SVCA, always protecting SVCA's reputation as a friendly and environmentally minded community.
- Responsible to develop and prepare the annual operating and capital budget(s) under the direction of the Board. Promptly reports any significant events or changes in circumstances which may affect SVCA operations to the board.
- Supervises bookkeeping, filing, and records retention to insure appropriate file maintenance and archiving processes. Maintains and updates an employee personnel system which includes a manual, job descriptions and salary guidelines in accordance with Board policies.
- Other duties may be assigned.

#### **Qualifications:**

The GM must be able to perform each essential duty satisfactorily through self or subordinate staff. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

#### **Experience, Knowledge And Skills**

- Five (5) years' experience with homeowners associations as an on-site community manager or other relevant management experience, including direct experience with preparation of legal and budget documents, community-building, and enforcement of codes and regulations.
- Current knowledge of Federal, State and Local Statutes and regulations.
- Demonstrated customer-service orientation and conflict-resolution skills.
- Demonstrated experience in leadership and teamwork style of management.
- Organizational and staff development skills.
- Excellent written and oral skills.
- Ability to communicate and work effectively with the Board of Directors and the membership
- A shared vision with the Board of Directors
- Strong financial management skills and experience
- Professional appearance and attitude
- Flexible work hours/days

#### **Education, Certificates, Licenses, Registrations**

**Previous HOA Experience is helpful.**

College degree; Bachelor's in business or public management, Master's preferred.

**JULIE ADAMEN**

**Subject:** RE: FW: GM Search  
**From:** "Julie Adamen" <julie@adamen-inc.com>  
**Date:** 8/29/2018 2:13 PM  
**To:** "'Leslie McRoberts'" <lcmcr2@gmail.com>

I advertise the position in my own publication and website, which is directed ONLY at our industry. I have 2 national publications that drive people directly back to the site (and the jobs). If I don't know the respondent(s) (which is highly unlikely) I am 1 degree of separation from them, having been in the industry for so long doing this type of work. I vet the candidates not only for qualifications but for "fit". I do not do background checks on advice of counsel, as I cannot guarantee where the information goes once the Board members receive it; but as Sudden Valley has its own HR dept., that shouldn't be a problem for you. Coach the Board on the interview process. Advise the Board on appropriate compensation, benefits, job description, etc.

I have been in business for 21 years in recruiting and placing community association managers, and have been extremely successful doing so.

Does this work?

Julie Adamen, President  
360.779.6507 phone  
877.368.1509 toll free  
Visit me on [LinkedIn](#)



**AUTHOR AND PUBLISHER OF ONLINE CLASSES FOR NEW MANAGERS AND STAFF:**  
**COMMUNITY ASSOCIATION MANAGEMENT 101**  
Revolutionizing how we train and support community managers

**COMING SOON! COMMUNITY ASSOCIATION MANAGEMENT 101 FOR BOARD MEMBERS!**

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**From:** Leslie McRoberts [mailto:lcmcr2@gmail.com]  
**Sent:** Wednesday, August 29, 2018 2:02 PM  
**To:** Julie Adamen  
**Cc:** lcmcr2@gmail.com  
**Subject:** Re: FW: GM Search

Yes, we have spoken before around 2 years ago when our GM gave notice, then after a traumatic search, he agreed to stay on until end of 2018. This time the Board voted to not extend his contract. This is all good information you've sent, and I would hope to have a small search team - no more than 3 people. As I said, step one is to find the right firm to work with us. As well as the fee structure, I'd like to be able to explain to the Board what the company will do for us. Such as - advertise the position, thoroughly vet the

applicants, review the chosen candidates with the Board, help with the interview process, etc. I'd like to present this information to the full Board at our regular meeting on September 13. Please send any additional information you think might be helpful.

Thank you for your prompt response.

Leslie

On 8/29/2018 1:47 PM, Julie Adamen wrote:

I would also advise you that from start to finish a search will likely take longer than the timeframe you have slotted. Most on site GMs have a contract, and they will have to give at least 30, and often 60 days' notice to their current employer. Some have 90 day term, clauses. Just FYI.

Julie Adamen, President  
360.779.6507 phone  
877.368.1509 toll free  
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**From:** Julie Adamen [<mailto:julie@adamen-inc.com>]  
**Sent:** Wednesday, August 29, 2018 1:44 PM  
**To:** 'Leslie McRoberts'; 'Julie Adamen'  
**Subject:** RE: GM Search  
**Importance:** High

Hi Leslie. I am familiar with your project, as I have placed one GM with you previously (through what was then EMB) as well as a temp GM (also through what was EMB). See below:

Julie Adamen, President  
360.779.6507 phone  
877.368.1509 toll free  
Visit me on [LinkedIn](#)



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**From:** Leslie McRoberts [<mailto:lcocr2@gmail.com>]  
**Sent:** Wednesday, August 29, 2018 1:34 PM  
**To:** Julie Adamen  
**Cc:** [lcocr2@gmail.com](mailto:lcocr2@gmail.com)  
**Subject:** GM Search

Ms. Adamen:

With the completion of our current General Manager's contract on December 31, 2018, Sudden Valley is starting a search for a new General Manager who would ideally come on board around Dec. 1. Step one is to identify a company to work with us who specializes in recruitment of managers for large HOAs.

Sudden Valley is located in northern Washington just outside of Bellingham. It is a community of over 7,000 people and some 2800 residences. We are responsible for the care and maintenance of our roads, of a golf course, a marina, multiple small parks and trails, and other recreational opportunities for our members. Further information can be found on our website at [suddenvalley.com](http://suddenvalley.com).

If your company were selected, please tell us how you would proceed with this job:

- - What assistance can we count on from you? As provided by contract. (Maybe I am not understanding your query?)
- - Approximately how many HOA General Managers have you placed in the last 2 years and how many of them are still in that position? 2016 to present, 6 on site GMs, all are still in place. Currently working on GM search for Suncadia. I am selective in the jobs for which I search.
- - What is your fee structure? 17% of the first years' salary if and only if a placement is made. No contingency, etc.
- - What information will you need from us? I'd like a phone meeting with the person or committee in charge of this endeavor. I will need the community breakdown: Annual

budget, # of staff, full listing of project complications and amenities, salary/bonus/benefit info, as well as other items.

I'm looking forward to taking the first step by presenting a list of potential search companies to our Board at our next meeting the beginning of September. Thanks for your interest in this effort.

Sincerely,  
Leslie McRoberts, SVCA Board of Directors, Secretary

4 Clubhouse Circle  
Bellingham, WA 98229  
Cell: 360-319-4910

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Leslie McRoberts - [lcocr2@gmail.com](mailto:lcocr2@gmail.com)

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Leslie McRoberts - [lcocr2@gmail.com](mailto:lcocr2@gmail.com)

**PROTHMAN  
EXECUTIVE  
RECRUITMENT**

**Subject:** Fw: GM Search  
**From:** Sonja Prothman <Sonja@Prothman.com>  
**Date:** 9/6/2018 9:40 AM  
**To:** "lcmcr2@gmail.com" <lcmcr2@gmail.com>

4 Clubhouse Circle  
Bellingham, WA 98229  
Cell: 360-379-4910

Leslie McRoberts, SVCA Board of Directors, Secretary

Hi Leslie,

We have completed one HOA GM search and that was for Lake Cushman Maintenance Company, an HOA like yours that manages a golf course, marina, parks etc.

To help keep costs down, we did a sourcing/screening which means we advertised, sent out a direct mail job announcement, collected applications and screened and interviewed the top applicants, and had a work session with the board to help them choose who to invite to final interviews. Then they handled the final interviews on their own.

Are you looking for a full recruitment? Or potentially just help with the recruitment?

Sonja

Sonja Prothman  
Prothman Company

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**From:** Leslie McRoberts <lcmcr2@gmail.com>  
**Sent:** Wednesday, August 29, 2018 1:33 PM  
**To:** information; lcmcr2@gmail.com  
**Subject:** GM Search

With the completion of our current General Manager's contract on December 31, 2018, Sudden Valley is starting a search for a new General Manager who would ideally come on board around Dec. 1. Step one is to identify a company to work with us who specializes in recruitment of managers for large HOAs. Sudden Valley is located in northern Washington just outside of Bellingham. It is a community of over 7,000 people and some 2800 residences. We are responsible for the care and maintenance of our roads, of a golf course, a marina, multiple small parks and trails, and other recreational opportunities for our members. Further information can be found on our website at [suddenvalley.com](http://suddenvalley.com).

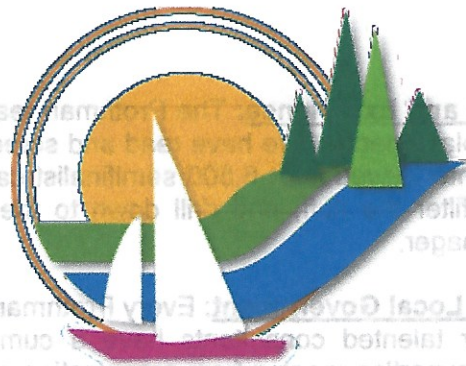
If your company were selected, please tell us how you would proceed with this job:

- What assistance can we count on from you?
- Approximately how many HOA General Managers have you placed in the last 2 years and how many of them are still in that position?
- What is your fee structure?
- What information will you need from us?

I'm looking forward to taking the first step by presenting a list of potential search companies to our Board at our next meeting the beginning of September. Thanks for your interest in this effort.

Sincerely,  
Leslie McRoberts, SVCA Board of Directors, Secretary

# Proposal to provide recruitment services for Sudden Valley Community Association's next General Manager



## Leadership is Key to the Sustainability of Any Organization

Professionalism, character, integrity, and the commitment of a leader inspires those in the workplace to go the extra mile and can greatly influence the team's success in achieving its objectives.

**Finding great leaders is what we do!**

**PROTHMAN**

**Executive Recruitment**

**Interim Staffing. Application Software. Job Board.**

## **STATEMENT OF QUALIFICATIONS**

### **ABOUT PROTHMAN**

Prothman specializes in providing national and regional executive recruitment services to cities, counties, districts and other governmental agencies throughout the United States. Founded in 2001, Prothman has become an industry leader known and respected for outstanding customer service, quality candidate pools, and our knowledge of local government.

### **OUR EXPERTISE**

**Recruitment Knowledge and Experience:** The Prothman team has conducted over 500 recruitments and interim placements. We have read and screened over 15,000 resumes, and we have personally interviewed over 6,500 semifinalist candidates. We know how to read between the lines, filter the fluff, and drill down to the qualities and experiences required to be a good manager.

**Firsthand Knowledge of Local Government:** Every Prothman team member has worked in local government. Our talented consultants have a cumulative 175 years in local government service, with expertise ranging from organization management, police and fire management, human resources, finance, public works and elected official public service.

### **OUR PROVEN PROCESS**

Clients and candidates continually tell us that we have the best process and client service in the industry. The tenure of our placements is among the best in the industry because we understand that "fit" is the most important part of the process; not just fit within the organization, but fit within the community, as well.

### **CONTACT INFORMATION**

Sonja Prothman - [sonja@prothman.com](mailto:sonja@prothman.com), 206.368.0050  
371 NE Gilman Blvd., Suite 310, Issaquah, WA 98027  
[www.prothman.com](http://www.prothman.com)  
[www.prothman-jobboard.com](http://www.prothman-jobboard.com)

Submittal Date: September 10, 2018

### **COMMITMENT TO PROVIDE SERVICE**

Prothman looks forward to working with Sudden Valley Community Association and commits to performing all services represented in this proposal.

## **STATEMENT OF QUALIFICATIONS - EXPERIENCE**

### **Current Recruitments**

**Island Transit, WA – Executive Director**

**Sallal Water Association, WA – General Manager**

**Ben Franklin Transit, WA – Director of Planning & Service Development**

**League of Oregon Cities, OR – Legislative Director**

**City of Clyde Hill, WA – City Administrator**

**Oregon Parks & Recreation Department, OR – Park Managers (2)**

**City of Grants Pass, OR – Public Safety Director**

**Deschutes Valley Water District, OR – General Manager**

**City of Troutdale, OR – Public Works Director**

**City of Umatilla, OR – City Manager**

**City of Bend, OR – Property Manager**

**City & Borough of Sitka, AK – HR Director**

**Tualatin Hills Park & Recreation District, OR – Communications Director**

**Eastern Sierra Transit Authority, CA – Executive Director**

**San Juan Island Fire Department, WA – Fire Chief**

**City of South Lake Tahoe, CA – City Attorney**

**City of Medina, WA – Planning Manager**

**Island County, WA – Engineering Manager**

**Lake Whatcom Water & Sewer District, WA – Operations Manager**

**City of South Lake Tahoe, CA – City Manager**

**City of Gunnison, CO – Community Development Director**

### **SAMPLE SCHEDULE**

Blue highlighted events represent meetings via phone or in person with the client

<b>Date</b>	<b>Topic</b>
<b>Weeks of September 10 &amp; 17, 2018</b>	<b>Interview Board via phone conversations. Gather information for position profile, send profile for review</b>
September 24, 2018	Post profile and start advertising
October 21, 2018	Application Close Date
Weeks of October 22 & 29, 2018	Prothman screens applications & interviews top 6 - 12 candidates
<b>November 8, 2018</b>	<b>Work Session to review semifinalists and pick finalists</b>

## **STATEMENT OF QUALIFICATIONS - PROJECT TEAM**

### **SONJA PROTHMAN - PROJECT LEAD**

As Vice President, Sonja directs the day-to-day operations of the Prothman Company and she assists with recruitments, interim placements, and organizational assessments. Sonja is a former councilmember for the City of Normandy Park, Washington, and brings to Prothman the "elected official" side of government – a vital perspective for understanding our clients' needs. Sonja also brings private sector expertise having worked with the Boeing Company where she was on the start-up team as lead negotiator for schedules and deliverables for the first 777 composite empennage. A Seattle native, Sonja earned a bachelor's degree in Communications from the University of Washington.

### **JOHN HODGSON - PROJECT SUPPORT**

John is a senior consultant for Prothman and brings 33 years of municipal service including, most recently, 7 ½ years as City Administrator/Chief Administrative Officer for the City of Kent, the sixth largest city in the state of Washington. Prior to that, John had 26 years in parks and recreation management for the City of Vancouver, WA, the Metropolitan Park District of Tacoma, and he was Director of Parks, Recreation & Community Services for the City of Kent from 1994-2005. John's awards for his service include Kent Chamber of Commerce Public Employee of the Year, WRPA Honor Fellow, Kiwanis Distinguished President, and the Kent Lions Club Community Service Award. John has a Bachelor of Science degree in Parks & Recreation Management from the University of Oregon (1980) and he completed the Cascade Management Series from the University of Washington Graduate School of Public Affairs (1992).

### **BARRY GASKINS - PROJECT SUPPORT**

Barry is responsible for candidate management. His attention to detail and understanding of timeliness to the customer and candidates is remarkable. Barry works with the lead consultant in following through with scheduling interviews, arranging candidate travel, managing candidate application packets, and assembly of candidate information to give to the client. Barry came to us from the Bill & Melinda Gates Foundation where he served as a Program Assistant for four years in the US Library Program. Barry earned his bachelor's degree from California State University in Los Angeles.

### **JARED ECKHARDT - PROJECT SUPPORT**

Jared is responsible for profile development and candidate outreach. He is a recent graduate from the University of Washington and we have enjoyed watching him learn and mature the past year.

Post profile and start advertising	September 24, 2018
Application Close Date	October 31, 2018
Prothman screens applications & interviews top 8 - 12 candidates	Weeks of October 22 & 29, 2018
Work Session to review finalists and pick finalists	November 8, 2018

## **EXECUTIVE SUMMARY**

Prothman has been in the business of finding highly qualified candidates for placement in local government organizations of various sizes with varying political ideologies for 17 years. We have worked for small organizations like Yachats, Oregon, pop. 800, to Emeryville, California, pop. 11,670, to large cities like Seattle, Washington, pop. 725,000. We understand politics, council and board dynamics and community passion, and we are experts in facilitating. We have designed our recruitment process so that all stakeholders are included, listened to and treated with respect. Our company takes pride in and stakes its reputation on finding qualified candidates who are the right "fit" for our clients. Anything less would be unacceptable!

Our strategy is to cast the widest net possible to ensure a diverse, qualified applicant pool. We have an aggressive national advertising campaign and our extensive databases allow us to mail and email the job announcement directly to employees in every city, county, and district in the US. Our recruitment process emphasizes "fit" and we take as much time as needed to meet with your team so that we can learn and understand the experience, qualities and personality traits required for candidates to be successful within your unique organization and community.

## **PROPOSED SCOPE OF WORK**

### **1. Develop a Tailored Recruitment Strategy**

#### **Project Review**

The first step will be to:

- ◆ Review the scope of work and project schedule

#### **Information Gathering and Research (*Soliciting Input*)**

**We will spend as much time as it takes to learn everything we can about your organization.** Our goal is to thoroughly understand the values and culture of your organization, as well as the preferred qualifications you desire in your next General Manager. We will meet via phone with:

- ◆ Board of Directors
- ◆ HOA Staff, as directed
- ◆ Meet with other stakeholders, as directed
- ◆ Review all documents related to the position

#### **Position Profile Development (*Identifying the Ideal Candidate*)**

We will develop a profile of your ideal candidate. Once the Position Profile is written and approved, it will serve as the foundation for our determination of a candidate's "fit" within the organization and community. Profiles include the following:

- ◆ **A description of the ideal candidate's qualifications**
  - Years of related experience
  - Ideal personality traits
- ◆ **Organization-specific information**
  - Description of the organization, position and key responsibilities
  - Priorities and challenges facing the organization
- ◆ **Community-specific information**
  - ◆ Compensation package details
  - ◆ Information on how to apply

## **2. Identify, Target, and Recruit Viable Candidates**

### **Outreach and Advertising Strategy (*Locating Qualified Candidates*)**

We recognize that often the best candidates are not actively looking for a new position--*this is the person we want to reach and recruit*. We have an aggressive recruitment strategy which involves the following:

- ◆ **Print and Internet-based Ads** placed nationally in professional publications, journals and on related websites.
- ◆ **Targeted Direct Mail Brochures** sent directly to hundreds of highly qualified HOA and city management professionals who are not actively searching for a new position.
- ◆ **Focused Candidate Outreach** via emails from our database of over 6,000 city/county ICMA registered managers.
- ◆ **Posting the Position Profile on Prothman's Facebook and LinkedIn pages, and on the Prothman Website**, which receives over five thousand visits per month from potential candidates.

## **3. Conduct Preliminary Screening**

### **Candidate Screening (*Narrowing the Field*)**

Once the application deadline has passed, we will conduct an extensive candidate review designed to gather detailed information on the leading candidates. The screening process has 3 key steps:

- 1) **Application Review:** Using the Position Profile as our guide, we will screen the candidates for qualifications based on the resumes, applications, and supplemental questions (to determine a candidate's writing skills, analytical abilities and communication style). After the initial screening, we take the yes's and maybe's and complete a second screening where we take a much deeper look into the training, work history and qualifications of each candidate.
- 2) **Internet Publication Background Search:** We conduct an internet publication search on all semifinalist candidates prior to their interviews. If we find anything out of the ordinary, we discuss this during the initial interview and bring this information to you.
- 3) **Personal Interviews:** We will conduct in-depth videoconference or in-person interviews with the top 8 to 15 candidates. During the interviews, we ask the technical questions to gauge their competency, and just as importantly, we design our interviews to measure the candidate's fit within your organization.

### **Candidate Presentation**

We will prepare and send to you a detailed summary report for the semifinalist candidates and binders which include each candidate's application materials, including resume, cover letter, and supplemental question responses, and the results of the personal interviews and publication search. We will travel to SVCA and discuss with you everything we have learned throughout our screening process. We will review with you the candidates' qualifications and experience, the results of the semifinal interviews and the candidates' strengths and weaknesses relative to fit within your organization. We will give you our recommendations and then work with you to identify the top 3 to 5 candidates to invite to the final interviews.

## **FEE, EXPENSES & GUARANTEE**

### **Professional Fee**

The fee for conducting a General Manager sourcing/screening recruitment is \$9,500. The professional fee covers all Prothman staff time required to conduct the recruitment. This includes all correspondence and on-site meetings with the client, writing and placing the recruitment ads, development of the candidate profile, creating and processing invitation letters, reviewing resumes, coordinating and conducting semifinalist interviews, and coordinating and attending the work session.

Professional fees are billed in two equal installments throughout the recruitment, one at the beginning and upon completion.

### **Expenses**

Expenses vary depending on the design and geographical scope of the recruitment. We do not mark up expenses and work diligently to keep expenses at a minimum and keep records of all expenditures. SVCA will be responsible for reimbursing expenses Prothman incurs on your behalf. Expenses include:

- Newspaper, trade journal, websites and other advertising (approx. \$1,000)
- Direct mail announcements (approx. \$1,500)
- Work Session Binders (\$12 per binder)
- Delivery expenses for Binders (approx. \$100 - 200)
- Consultant travel: mileage at IRS rate, travel time at \$40 per hour (approx. \$260 per trip)

Expenses are billed monthly.

### **Other Expenses**

- Background checks and references (\$300 per candidate)

### **Warranty**

Repeat the Recruitment: If a top candidate is not chosen, we will repeat the recruitment for a fee of \$600 plus the expenses.

### **Cancellation**

You have the right to cancel the search at any time. Your only obligation would be the fees and expenses incurred prior to cancellation.

**MANAGEMENT  
MATTERS, LLC**



# MANAGEMENT MATTERS, LLC

6302 Route 191, PO Box 529, Mountainhome, PA 18342

Phone: 570.350-3550 Fax: 570.646-5337

Email: ManagementMatters@ptd.net

Website: MgmtMatters.net

August 30, 2018

Leslie McRoberts  
Board of Directors Secretary  
Sudden Valley Community Association  
4 Clubhouse Circle  
Bellingham, WA 98229

Dear Ms. McRoberts,

This letter sent via email is in response to your email message on Wednesday, August 29, 2018. Based on the information provided in your email and our discussions back in 2016, the Team at Management Matters has put together the attached proposal.

Since its formation in 2011, Management Matters has been involved in Association search projects in Connecticut, Pennsylvania, Virginia, North Carolina, South Carolina, Georgia, Florida, Texas and California. In addition to our search projects, Management Matters has been involved in consulting projects in New Jersey, Delaware, Maryland, West Virginia, Missouri, Indiana, Oregon and the Caribbean.

Management Matters recently completed a search for the lake Ridge Parks and Recreation Association in Lake Ridge, Virginia and next week will complete a search for the Emerald Bay Community Association in Laguna Beach, California. Of all the Key Team Member Searches Management Matters has handled since 2011 (over fifteen), only two of the GM's have moved to other positions (one after three years of service, the second after five years of service).

In order to meet your schedule, a search for a new General Manager/COO for SVCA should commence in the next thirty days (ideally in the next twenty days). Can we set a time to discuss this proposal? I am generally available from 7:00 AM to 8:00 PM (west coast time) for telephone conferences.

Thank you for taking the time to review this information. I look forward to talking with you at your convenience in the days/weeks ahead.

Sincerely,  
MANAGEMENT MATTERS LLC

Jeffrey M. Evans  
Principal



# MANAGEMENT MATTERS, LLC

6302 Route 191, PO Box 529, Mountainhome, PA 18342

Phone: 570.350-3550 Fax: 570.646-5337

Email: ManagementMatters@ptd.net

Website: MgmtMatters.net

## RECRUITMENT PROPOSAL FOR THE GENERAL MANAGER/COO POSITION Sudden Valley Community Association Bellingham, Washington

Management Matters, LLC proposes to manage the recruitment and screening process for the General Manager/Chief Operating Officer Position for the Sudden Valley Community Association.

Management Matters handles Executive Searches for Planned Communities and Private Clubs. The Executive Search services provided by Management Matters differ from the services provided by other search firms in four very specific ways:

- Management Matters only recruits for Executives for Planned Communities and Private Clubs. Having worked in these two domains and being certified in these two areas, Management Matters knows what it takes to manage complex Planned Communities and Private Clubs.
- Management Matters provides online testing for the three position finalists via an independent firm testing for critical reasoning and logic, work habits and management style and abilities.
- Management Matters only handles one Executive Search at a time. So not only do you get our full attention, but you don't have to worry about competing for candidates within the search firm the way you do with larger search firms.
- Management Matters charges a flat rate for our time and expenses versus a percentage of salary and benefits.

In order to accomplish this critical assignment, Management Matters proposes to implement the following ten step process:

- A. Develop a detailed Position Announcement for the General Manager/COO Position.
- B. Advertise the position in multiple professional locations.
- C. Develop and distribute a follow-up questionnaire and request for detailed information from all of the candidates determined to be eligible to move forward in the process after the first cut.
- D. Narrow the field of candidates to approximately ten (10) and interview that group via telephone.
- E. Narrow the field of candidates to approximately six (6) and interview that group with the Search Committee (or Board of Directors) by telephone or in person at Sudden Valley.
- F. Recommend three (3) finalists to the Board and facilitate and participate in their interviews with the Board at Sudden Valley.
- G. Facilitate the online testing of the three (3) finalists for: critical reasoning and logic, work habits and management styles and abilities. A profile and narrative of the testing for each of the finalists will be provided to the Board after the in-person interviews.

- H. Facilitate the Background and Reference Checks for the candidate selected by the Board prior to a formal offer being signed.
- I. Assist the Board with developing a formal offer of employment (and employment contract if desired) for the candidate the Board selects.
- J. Provide an announcement of the new General Manager/COO for the Sudden Valley Community Association to utilize with their Property Owners and the Outside Community around Sudden Valley.

The total cost to the Sudden Valley Community Association for Management Matters LLC to manage the entire recruitment and screening process for a new General Manager/COO is twenty-nine thousand seven hundred and fifty dollars (\$29,750.00). Included in this fee are all the following:

1. Telephone meetings with the Search Committee (or Board of Directors) to secure the information necessary to develop the Position Announcement and advertise the position.
2. Advertising for the position.
3. Administrative support for the search including all office related expenses.
4. Review of resumes received and distribution of follow-up questionnaire and request for detailed information to those making the first cut.
5. Review of supplementary information received in order to narrow the field to approximately ten (10).
6. First round interviews via telephone.
7. Travel expenses (two trips) to Sudden Valley for the second and third round of interviews.
8. Testing expense for the three finalists by an independent testing group that will provide the profile and narrative for each of the finalists.
9. The expenses of background and reference checks for the candidate selected by the Board.
10. Assistance to the Board in developing a formal offer of employment (and employment contract if desired) for the candidate selected.
11. Development of an announcement for the Sudden Valley Community Association's new General Manager/COO.

Contingency- In the event the Sudden Valley Community Association Board of Directors is not satisfied with the three finalists brought to them by Management Matters, the search will continue with the Sudden Valley Community Association paying only for the continued expenses of the search (advertising, testing and travel) at cost.

Guarantee - In the event the new General Manager/COO ultimately selected and approved by the Board leaves in 180 calendar days or less, Management Matters will renew the search with Sudden Valley Community Association paying only for the expenses of the renewed search (advertising, testing and travel) at cost.

Note- This proposal is valid through December 31, 2018.

Every candidate is unique. Let Management Matters identify the candidate that is uniquely right for the Sudden Valley Community Association.