



Foreside
Real Estate Management

Property Management Company Comparison Worksheet

PROFESSIONAL INTERVIEW WORKBOOK
FOR CONDOMINIUM BOARDS & HOA COMMUNITIES



MAKE INFORMED
DECISIONS



COMPARE
MANAGEMENT
COMPANIES



EVALUATE VALUE,
SERVICES & FEES



FIND THE RIGHT
PARTNER FOR YOUR
COMMUNITY



PROTECT YOUR
COMMUNITY'S
INVESTMENT

— A MAINE COMPANY —

Balance of Scale + Local Service

Prepared to assist boards comparing management proposals, interviewing firms, and evaluating long-term management fit.

HOW TO USE THIS WORKSHEET

Use this workbook during:

- Management company interviews
- Proposal comparisons
- Transition discussions
- Self-managed community evaluations

Scoring:

- 1 = Poor
- 3 = Adequate
- 5 = Excellent

Record notes immediately after each interview.

SECTION 1: COMPANY SNAPSHOT COMPARISON

| Criteria | Company A | Company B | Company C |
|-------------------------------|-----------|-----------|-----------|
| Company Name | | | |
| Years in Business | | | |
| Is it a Maine Company | | | |
| Number of Communities Managed | | | |
| Dedicated Manager Assigned | | | |
| Emergency Coverage Available | | | |
| References Provided | | | |

Board Notes:

SECTION 2: COMMUNICATION & RESPONSIVENESS

Rate 1-5

| Criteria | A | B | C |
|---------------------|---|---|---|
| Board Communication | | | |
| Response Time | | | |
| Meeting Preparation | | | |
| Owner Communication | | | |
| Follow Through | | | |
| Accessibility | | | |

Board Notes:

SECTION 3: FINANCIAL OVERSIGHT

| Criteria | A | B | C |
|-----------------------|---|---|---|
| Monthly Reports | | | |
| Budget Support | | | |
| Reserve Planning | | | |
| Delinquency Oversight | | | |
| Invoice Transparency | | | |
| Strategic Guidance | | | |

Board Notes

SECTION 4: MAINTENANCE & OPERATIONS

| Criteria | A | B | C |
|------------------------|---|---|---|
| Preventive Maintenance | | | |
| Vendor Oversight | | | |
| Work Order Tracking | | | |
| Emergency Response | | | |
| Project Management | | | |

Board Notes:

SECTION 5: BOARD SUPPORT & GOVERNANCE

| Criteria | A | B | C |
|----------------------|---|---|---|
| Meeting Support | | | |
| Agenda Preparation | | | |
| Governance Knowledge | | | |
| Long-Term Planning | | | |
| Transition Support | | | |

Board Notes:

SECTION 6: LOCAL EXPERIENCE & COMMUNITY FIT

| Criteria | A | B | C |
|-------------------------------------|---|---|---|
| Maine Company | | | |
| Local Vendor Relationships | | | |
| Experience with Similar Communities | | | |
| Responsive Leadership Access | | | |
| Balance of Scale + Local Service | | | |

Board Notes:

SECTION 7: MANAGEMENT PROPOSAL SUMMARY

| Item | Company A | Company B | Company C |
|------------------------|-----------|-----------|-----------|
| Annual Fee | | | |
| Contract Length | | | |
| Termination Clause | | | |
| Additional Fees | | | |
| Transition Costs | | | |
| Meeting Fees | | | |
| Project Oversight Fees | | | |

Board Notes:

SECTION 8: FINAL WEIGHTED SCORECARD

Communication: 25%

Financial Oversight: 25%

Board Support: 20%

Maintenance: 15%

Local Experience: 15%

Total Score:

Company A _____

Company B _____

Company C _____

SECTION 9: QUESTIONS EVERY BOARD SHOULD ASK

- Why do communities switch to your company?
 - What happens if our manager leaves?
 - How many communities does one manager oversee?
 - How are emergencies handled?
 - What additional fees should we expect?
 - What support do boards receive outside of meetings?
-

FINAL PAGE:

INTERVIEW SUMMARY & RECOMMENDATION

Preferred Company:

Reasons:

- Communication
- Financial Oversight
- Board Support
- Cost
- Local Experience
- Technology
- Other

Board Comments:

Recommended Next Steps:

Strong management supports communication, financial stability, maintenance planning, and long-term community success.

Forside Real Estate Management
A Maine Company. Local relationships. Professional Management.