



THE CMA SEARCH PROCESS

CLIENT CONSULTATION AND ANALYSIS

Develop company profile through extensive dialogue with client

- History and background of the organization
- Market positioning
- Management philosophy, culture and strategic plan
- Organizational structure
- Employment advantages

Define a position description based on client input and feedback

- Title
- Duties and responsibilities
- Desired qualifications and character traits
- Potential for professional growth and advancements
- Compensation

SEARCH STRATEGY AND PLAN

Formulate a search plan after listening to client's needs and objectives

- Determine search strategy
- Determine interview and hire process
- Assign recruiting team

Development of the "Straw Man" concept

- Using an initial cast of candidates to agree on the right profile/skillset
- In conjunction with Management and/or Board Members

CANDIDATE IDENTIFICATION AND ASSESSMENT

Identify prospective candidates as defined by client in previous conversations

- Utilize in-house resources, library and database to identify potential candidates
- Implement search strategy
- Solicit interest from prospective candidates

Interview and thoroughly assess candidates against client's needs and objectives

- Gather preliminary information on prospective candidates
- Coordinate comprehensive face-to-face interviews with select candidates
- Evaluate candidate qualifications and background
- Review and select final candidates for client presentation

CLIENT PRESENTATION

Prepare written reports on selected candidates for client review

- Develop candidate profiles/resumes
- Summarize each candidate's capabilities and potential
- Develop candidate matrix

Present selected candidates for discussion with client

- Submit written candidate information
- Review candidates with client
- Select candidates for interview with client

CANDIDATE SELECTION AND HIRE

Coordinate interviews between candidate and client

- Coordinate logistics to ensure timely meetings
- Ensure client and candidates are prepared for the interviews
- Review interviews with candidates and client

Coordinate final candidate selection and hiring process

- Review recommended candidates
- Coordinate additional meetings, as necessary
- Conduct comprehensive reference investigations
- Negotiate terms of offer and manage the acceptance

TRANSITION

Consult with the client and candidate to ensure a successful transition

- Assist candidate with transition to new position
- Periodically contact client and candidate to monitor progress

CORPORATE MANAGEMENT ADVISORS MODIFIED RETAINER AGREEMENT



This Agreement between **Corporate Management Advisors, Inc.** ("CMA") and **Columbia Greene Board of Realtors** ("Columbia Greene Board of Realtors") is for services rendered by CMA for the search, recruitment, and placement of the **Association Executive** (the "Assignments") as so designated by Columbia Greene Board of Realtors.

The fee for professional services performed by CMA is **25%** (the "Fee") of the first year Total Estimated Compensation (TEC) and is defined as any and all remuneration paid or accrued for the first year of service including, but not limited to, salaries, wages, signing bonuses, and performance bonuses. Columbia Greene Board of Realtors is responsible for all pre-approved out-of-pocket expenses including travel, meals, lodging, etc., incurred by CMA during such Assignments.

CMA's billing procedures are as follows:

- I) \$10,000. of fee will be invoiced and due upon signing of Agreement.
- II) The balance will be invoiced and due upon completion of Assignment.

It is agreed and understood that this Retainer represents a non-refundable good faith deposit of \$10,000 to cover CMA's out-of-pocket expenses (research time, telephone expense, labor, etc.). In accepting any Assignment, CMA agrees to provide Columbia Greene Board of Realtors with the most qualified candidates, which can be identified and recruited in accordance with the applicable job description and compensation parameters. This typically means from one to five candidates.

Any and all candidates presented to Columbia Greene Board of Realtors by any source other than CMA during the course of such Assignments, are considered candidates of CMA under this Agreement. Any and all candidates submitted by CMA, and hired directly or indirectly by Columbia Greene Board of Realtors within a twelve-month period from the initial submission, are subject to the "Fee" contemplated by this Agreement.

If Columbia Greene Board of Realtors hires the candidate as a contractor or for a temporary role, Columbia Greene Board of Realtors will pay CMA 25% of the contracted rate on a monthly basis. If that contractor becomes a permanent employee, the fees generated from the contractor and received by CMA will be applied to the final permanent placement fee.

One-half Fee will be charged if an offer of employment is extended by Columbia Greene Board of Realtors, accepted by the candidate, and subsequently rescinded by Columbia Greene Board of Realtors through no fault of the candidate.

CMA's responsibilities are under a best efforts basis and CMA cannot guarantee that a successful placement will be made, however, its recruiting efforts will continue until it is mutually agreed that the Assignments have been satisfactorily concluded. If the search is put on hold for 90 days, on the 90th day the search will be considered closed.

Guarantee

CMA offers a 90 day guarantee on all candidates placed with Columbia Greene Board of Realtors, if Columbia Greene Board of Realtors validates the guarantee policy by paying Fee within 10 days of start date. If, for any reason, the individual hired is discharged for cause within the 90 day period, or should said individual leave without cause, CMA will endeavor via its resources to issue a one-time replacement at no additional charge.

AGREED between the parties this _____ day of _____ 2023.