

Executive Search Decision Points

Phase 1: Position and Budget Approval

- ☐ Consult with CHRO, finance and senior leadership and obtain approval to create a new position, fill a vacant position, or modify an existing position
- ☐ Coordinate with Finance to ensure funding source, available space, and available budget
- ☐ Draft/edit position description, propose position title, and assess where position will fit within organizational chart (reach out to HR for assistance)
- ☐ Finalize the position with HR
- ☐ Consult with HR on salary range
- ☐ Determine if BOT or System Office approval is required for the appointment.

Decision Points

- *Job classification and title*
- *Reporting structure/organization chart*
- *Role and scope of responsibilities budget, number of direct and indirect reports, portfolio of responsibilities.*
- *Desired qualifications and experience*
- *Ensure budget is sufficient for anticipated salary offer, consider peers and labor market*

Phase 2: Search Preparation

- ☐ Meet with search consultant to discuss timeline, search committee membership, search process, ad plan, salary, etc.
- ☐ Review Leadership Hiring Guide

Decision Points

- *Committee membership*
 - *Appoint a strong chair*
 - *Assess willingness and capacity of members to serve on working committee*
 - *Consider campus or affiliate representation*
- *Committee size-recommend no more than 8 individuals*
- *Extent of committee role (pre-screening, screening, interview only)*
 - *Clarify mandate- i.e, to identify 2-3 individuals for hiring managers consideration*
- *Ideal timeline and start date*
- *When to set priority deadline*
- *Salary range – what to communicate to candidates*
- *At what point in process will hiring authority get involved (e.g., screening, interviewing, on-site visits)*
- *Where to advertise*
- *Is there an appropriate working title or other employment branding to make the position attractive in the labor market*

Phase 3: Search Kickoff

- ☐ Hiring manager delivers charge to search committee which includes:
 - The role
 - Context and history of the position
 - Timeline
 - Expectations for the committee
 - Confidentiality

Decision Points

- *Preferred education and experience*
- *Critical hard and soft skills*
- *Traditional vs. nontraditional*

Phase 4: Screening and Initial Interviews

- ☐ Pre-screen the candidate pool (i.e., narrow from a field of 50+ to 15-20) and/or assign a designee to pre-screen (optional)
- ☐ Participate in initial interviews, typically via Zoom (optional)
- ☐ Consult with HR consultant and search committee regarding on-site visit format

Decision Points

- *Whether to personally pre-screen all applicants, designate a pre-screener (e.g., search chair or other trusted colleague), or both*
- *Whether to require any quantitative data or rely solely on qualitative review*
- *Extent of involvement in screening interviews*
- *Extent of involvement in planning on-site visits*
 - *Who will be invited to meet the candidate at on-site visits? Whose opinion would be valuable in this context?*
 - *Will the candidate be required to demonstrate a skill/work product, prepare a presentation, and/or address a hypothetical scenario?*

Phase 5: On-site Visit

- ☐ Format for onsite visit
 - Meet with finalists on-on-one, small groups or public
 - Develop presentation topic and prompt, if applicable
 - Determine background materials, including itinerary, org charts, strategic plan website materials, campus map, etc.
- ☐ Obtain feedback from committee/stakeholders (via committee chair, email, and/or survey)
- ☐ Obtain feedback from HR consultant re salary, benefits, start date, etc.

Decision Points

- *Whether to meet in office, conference room, or take candidate out for a meal*

Phase 6: Due Diligence

- ☐ Inform candidate that you will contact references
- ☐ Review public media check
- ☐ Review feedback from committee/stakeholders

Decision Points

- *How many finalists to reference?*
- *Which references to call?*
- *Who will call references?*
- *Which candidate do you want to move forward to offer stage?*

Phase 7: Offer

- ☐ Consult with HR consultant regarding salary, start date, relocation, and any other offer terms (HR will engage in preliminary conversations with candidate prior to formal offer)
- ☐ Reach out to candidate personally if necessary (optional)
- ☐ Initiate background check
- ☐ HR review background check and discuss with Legal if necessary (very rare)
- ☐ Approve HR to extend formal offer
- ☐ Reach out to candidate to offer congratulations upon acceptance and discuss next steps
- ☐ Turn over search records to HR for search file

Decision Points

- *Offer terms including salary, start date and relo or sign on if offered.*
- *If and when one-on-one contact with candidate is necessary*
- *Whether any background issues would preclude employment (in consultation with HR/Legal)*

Phase 8: Wrap-up

- ☐ Reach out to candidate to offer congratulations upon acceptance and discuss next steps
- ☐ Turn over search records to HR for search file
- ☐ Work with HR and Communications to issue System Office announcement (recommended) and/or public press release (optional)

Decision Points

- *When and how to announce the new hire to team, division, System Office, and beyond*