ANATOMY OF A SEARCH

1. DETERMINE BUDGET – The budget for the position, including salary and benefits, should be established based on comparables in the area because this will help determine the level of candidate one can realistically approach.

2. DEVELOPMENT OF JOB DESCRIPTION – The scope of the job, along with a carefully thought-out and specific listing of the key tasks, should be designed in a way that meets legal requirements along with organizational desires. At this time we recommend the search committee find out from the board what it sees as the 3 most crucial tasks the individual should accomplish within his/her first quarter, six months or year, as well as the criteria upon which success will be based.

3. ASSESSMENT OF NEEDS – For anyone to be successful in the job there must be agreement among key players of the characteristics, skills and experience desired of the person to be hired, based on the job description. This assessment should also look at the strengths and weaknesses of those in the position previously, in terms of what the organization is and *is not* looking for and why.

4. ASSESSMENT OF ORGANIZATION – Candidates will want to know about the organization, its needs, position in the community and strengths and weaknesses. They will also want to know what the organization can offer in terms of support, training, salary, benefits, etc. This would not be a typical organizational assessment, but rather a very targeted one to elicit the type of information suggested above.

5. IDENTIFICATION OF POTENTIAL CANDIDATES – While an organization can – and might – post an opening in local and industry media, as well as ask their stakeholders who they might know, we have found one of the most effective techniques is to speak with community and industry thought leaders to ask them who they respect and why, as well as to get contact information of those they recommend. We then invite those who have been recommended to submit letters of interest along with résumés.

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Obviously, if the opening is to be posted, this is also the time to identify the most appropriate places to post, obtain pricing for posting, prioritize placements and then post.

6. INITIAL SCREENING – The search consultant generally handles the initial screening, though members of the search committee may participate if desired. The candidates will be evaluated on the basis of how closely their background, skills and interests match the previously defined criteria. This is usually done on the basis of the paperwork submitted, but might include a phone interview of at least the most likely candidates.

7. INTERVIEWS – Generally the search consultant conducts the initial interview, which might be by phone. Here, again, the search committee can participate, but unless it or a sub-committee speaks with all the candidates, we don't recommend it because it is difficult to ensure that the evaluation of each candidate is consistent.

   Depending on how many individuals the search committee would like to interview there might be one or two additional interviews to narrow the field. For CEO and other senior level positions, **we suggest that the top two candidates go before the entire board.**

8. SELECTION AND OFFER – Candidates are evaluated against the criteria first established, references and perhaps their credit scores are checked, and the top candidate receives an offer. Contract terms are ironed out if he/she accepts. At this time we recommend reviewing with that person the areas on which he or she will be evaluated and when that evaluation should be expected.

9. CHECK-BACK – The search consultant will be available to both the board and the new hire for confidential or mediation-oriented consultation for six months following the hire.

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