

Project Methodology

Overview

SGR provides a comprehensive scope of executive search services, and each executive search service contract is tailored to meet the client's specific needs. However, a full service executive search typically entails the following:

1. Organizational Inquiry and Analysis

- Outline Project Plan and Timeline
- Individual Interviews with Search Committee and Key Staff Members
- Development of Position Profile and Production of High Quality Brochure
- Search Committee Briefing to Review/Approve Position Profile Brochure

2. Advertising and Recruitment

- Ad Placement
- Recruitment Video (optional)
- Email Distribution and Marketing of Position Profile
- Ongoing Communication with Applicants and Prospects

3. Initial Screening and Review

- Management of Applications
- Triage and Scoring of Resumes
- Search Committee Briefing to Facilitate Selection of Semifinalists

4. Evaluation of Semifinalist Candidates

- Personal Interaction with Semifinalist Candidates
- Written Questionnaire
- Recorded Online Interviews
- Media Search Stage 1
- Search Committee Briefing to Select Finalists

5. Evaluation of Finalist Candidates

- Comprehensive Media Search and Report Stage 2
- Comprehensive Background Screening Report
- DiSC Management Assessment (optional)

6. Interview Process

- Assessment Center Process
- Conduct Interviews
- Deliberations
- Reference Checks

7. Negotiations and Hiring Process

- Determine the Terms of an Offer
- Negotiate Terms and Conditions of Employment
- Announcement/Press Release and Transition Strategy

Step 1: Organizational Inquiry and Analysis

In the Organizational Inquiry and Analysis Stage, SGR devotes tremendous energy to understanding your unique culture, environment, and goals to ensure you get the right match for your particular needs.

Outline Project Plan and Timeline

SGR will meet with the client at the outset of the project to finalize the search plans and timeline. At this time, SGR will also request that the client provide additional information about the community, organization, and position. Information requested will include general information or available resources about the community, school district, economic vitality, political leadership, organization, strategic plan, governing body goals and objectives, budget information, major projects, job description, salary range, benefits package, etc.

Individual Interviews with Search Committee and Key Personnel

Fully understanding your needs is the most critical part of conducting a successful executive search. SGR conducts individual interviews with the Search Committee, key staff, and/or direct reports to find out more about the position, special considerations, and the political environment. These interviews last approximately 30 minutes to one hour each and identify individual issues that may affect the dynamics of the search, as well as develop a composite understanding of the organization's preferences. This process helps with organizational buy-in and will assist us in developing the profile as we look for any significant staff issues or major disconnects that may not otherwise be apparent.

Development of Position Profile Brochure

Following the individual interviews and internal analysis, SGR will develop a draft position profile brochure that is reviewed and revised in partnership with you until everyone agrees it accurately reflects the sought-after leadership and management characteristics. A sample brochure is included with this proposal document.

Search Committee Briefing to Review/Approve Position Profile

This communication with the Search Committee may be conducted in person, over the phone, or even via email, depending on the preference of the organization. This briefing is designed to report on themes or trends identified in the individual staff interviews and in particular to determine if there are any disconnects in perceptions or expectations regarding the roles and responsibilities of the position. SGR's goal is to zero in on the specific attributes you want and need, both tangible and intangible. SGR will evaluate the responsibilities, organizational and cultural demands, technical background, personality, and potential required. SGR will also develop a clear understanding of salary range, benefits, and other relevant employment expectations. Of particular importance is to identify any "litmus tests" that are absolute prerequisites to you before starting the recruitment.

Step 2: Advertising and Recruitment

The Advertising and Recruitment stage includes ad placement, email distribution of the position profile, responding to inquiries about the position, and ongoing communication with applicants and prospects.

Ad Placement/Marketing

The Project Manager and client work together to determine the best way to advertise and recruit for the position. Ads are typically placed in various state and national publications, targeting the most effective venues for reaching qualified candidates for that particular position.

Recruitment Video

SGR offers the option of developing a custom video recruitment ad, which can be posted on YouTube and linked to other media sources. It is estimated that job postings with video icons are viewed 12 percent more than traditional job postings, and that the job application rate increases by an average of 34 percent when video is added. A sample SGR recruitment video for the City of Plano, Texas, can be viewed at: <http://tinyurl.com/PlanoFC>.

Email Distribution and Marketing of Position Profile

SGR's preferred strategy is to rely on email distribution of the position profile brochure to key opinion leaders and potential prospects across the country. The position will be announced in our "10 in 10" e-newsletter, which reaches over 60,000 local government professionals, in addition to a targeted email announcement to specific professional categories and/or areas of the country. By utilizing an email distribution strategy, these brochures tend to "get legs" of their own, resulting in a very high penetration rate at minimal cost.

SGR will utilize Facebook, Twitter, personal phone calls, personal emails, and LinkedIn to promote the position. This communication is both to solicit high potential candidates and to encourage key local government professionals to share information within their professional circles.

Ongoing Communication with Applicants and Prospects

SGR communicates with all applicants on a frequent and ongoing basis to ensure applicants stay enthusiastic about the opportunity. Outstanding prospects often will not submit a resume until they have done considerable homework on the available position. A significant number of inquiries will be made, and it is essential that the executive search firm be prepared to answer those questions with fast, accurate, and complete information, and in a warm and personal manner. This is one of the first places a prospective candidate will develop an impression about organization, and it is an area in which SGR excels.

Step 3: Initial Screening and Review

This stage of the executive search involves managing the flow of resumes, and screening and evaluating resumes.

Management of Applications

Handling the flow of resumes is an ongoing and significant process. On the front end, it involves tracking resumes and promptly acknowledging their receipt. It also involves timely and personal responses to any questions or inquiries.

Triage and Scoring of Resumes

SGR uses a triage process to identify high probability, medium probability, and low probability candidates. The triage ranking is focused on overall assessment based on interaction with the applicant, qualifications, any known issues regarding previous work experience, and evaluation of cultural fit with the organization.

In contrast with the triage process described above, which focuses on subjective assessment of the resumes and how the candidates present themselves, we also evaluate each candidate to make sure that the minimum requirements of the position are met, and which of the preferred requirements are met. This sifting process assesses how well candidates' applications fulfill the recruitment criteria outlined in the position profile.

Search Committee Briefing / Selection of Semifinalist Candidates

At this briefing, SGR will provide a comprehensive progress report via PowerPoint presentation and will facilitate the selection of approximately 10-12 semifinalists. The presentation will include summary information on the process so far, the candidate pool overall, and any trends or issues that have arisen, as well as a briefing on each candidate and their credentials. No other firm offers this level of reporting detail and transparency.

Step 4: Evaluation of Semifinalist Candidates

Reviewing resumes is an important and valuable step in the executive search process. However, the simple fact is that resumes can be misleading. They tell you nothing about the individual's personal qualities or his/her ability to get along with other people. Resumes can also exaggerate or inflate accomplishments or experience. SGR's responsibility is to go more in-depth than the resume to ensure that those candidates who continue in the process are truly outstanding.

Personal Interaction with Semifinalist Candidates

SGR's goal is to have a clear understanding of the person behind the resume and what makes him/her an outstanding prospect for you. The evaluation of semifinalist candidates includes follow-up by phone when appropriate to ask any questions about underlying issues.

Written Questionnaire

SGR will ask semifinalist candidates to complete a comprehensive written exercise designed to provide greater insight into candidate thought processes and communication styles. SGR's written instrument is custom-designed around the priorities identified by the Search Committee and usually includes about 20 questions focusing on 5-6 key areas of particular interest to the client. This written instrument will be included with the semifinalist briefing book with the cover letters and resumes.

Recorded Online Interviews

SGR offers the option of recording short online videos of candidates answering pre-recorded questions. This provides a very insightful, efficient and cost effective way to gain additional insights to utilize in selecting finalists you want to come in for live interviews. The online interviews allow the Search Committee to evaluate technological competence, demeanor, verbal communication skills, and on-camera presence. Online interviews also convey to candidates that the organization is using leading edge technology in its business processes and provide an opportunity for the Search Committee to ask candidates questions on specific topics of special interest. Online interviews are emailed to the Search Committee for viewing prior to selection of finalist candidates.

Media Search Stage 1

Stage 1 of our media search involves a comprehensive review of all newspaper articles on the candidate in major news outlets within the previous two years. These media reports at the semifinalist stage have proven helpful by uncovering issues that were not previously disclosed by prospective candidates. The Project Manager will communicate any "red flags" to the Search Committee immediately upon discovery.

Search Committee Briefing / Selection of Finalist Candidates

At this briefing, SGR will provide each member of the Search Committee with a briefing book and present a progress report on the semifinalist candidates. The progress report will include discussion of written questionnaires, online interviews, and any additional information obtained about the candidate. The purpose of this briefing is to facilitate narrowing the list to 4-6 finalists who will be invited for personal interviews.

Step 5: Evaluation of Finalist Candidates

Once the finalists have been selected, SGR will coordinate with you to schedule interviews.

Comprehensive Media Search and Report Stage 2

These Stage 2 Media Reports are compiled by utilizing our proprietary media search process including variations of the candidates' names and states/cities in which they have lived or worked, and searches of local papers where the candidates have lived or worked. We also search social media sites. The Media Reports typically range from 20-300 pages per candidate and may include news articles, links to video interviews, blog posts by residents, etc. The Media

Reports are put into an easy-to-read format and recorded onto flash drives for the Search Committee. The candidate's name is highlighted each time it appears.

These media reports have proven helpful to Search Committees by uncovering issues that were not previously disclosed by candidates and that would not have been discovered through a quick Internet search. The Media Reports also give the Search Committee an overview of the type and extent of press coverage that a candidate has experienced over the course of his/her career.

Comprehensive Background Investigation Reports

Through SGR's partnership with FirstCheck, a licensed private investigations company, we are able to provide our clients with comprehensive background screening reports that include detailed information such as:

- Social Security number trace
- Address history
- Driving history/motor vehicle records
- Credit report
- Federal criminal search
- National criminal search
- Nationwide wants and warrants
- Global homeland security search
- Sex offender registry search
- State criminal search (for current and previous states of residence)
- County criminal search (for every county in which candidate has lived or worked)
- County civil search (for every county in which the candidate has lived or worked)
- Education verification

A sample Background Screening Report is included with this proposal document.

Psychometric Assessment (optional)

It is critical for you to know as much as you can about your new executive before hiring him/her. Historically, employers have depended upon resumes, references, and interviews as sources of information for making hiring decisions. In practice, these sources have often proved inadequate for consistently selecting successful employees. The use of assessments has become essential for employers who want to place the right people in the right positions. SGR uses a DiSC Management assessment tool, which is among the most validated and reliable personal assessment tools available. The DiSC Management Profile analyzes and reports comprehensively on the candidate's preferences in five vital areas: management style, directing and delegating, motivation, development of others, and working with his/her own manager.

Step 6: Interview Process

Once the finalists have been selected, SGR will coordinate with you to schedule interviews.

Assessment Center Process

This is a proprietary assessment center process customized to your search. Our assessment center process provides the opportunity to evaluate candidates' written and interpersonal communication skills, as well as critical analysis skills.

Conduct Interviews

SGR will schedule interviews at a date/time convenient to the client. This process can be as simple, or as complex, as the client desires. SGR will help you determine the specifics you need. SGR will prepare sample questions and will participate throughout the process to make it smooth and efficient.

Deliberations

At this meeting, SGR will facilitate a discussion about the finalist interviews and assist the Search Committee in making a decision on whether to bring back one or more candidates for a second interview.

Reference Checks

Our reference checks are the most comprehensive in the industry. We place very little confidence on the references provided by the candidates since those can be expected to be biased. Instead, we will typically talk to as many as 20 professional contacts for a given candidate including elected officials, direct supervisors, direct reports, internal organizational peers, professional peers in other organizations, civic leaders, and media representatives. We always seek out the candidate's greatest critics and greatest fans to ensure a complete, yet balanced, perspective and overview of each candidate.

Step 7: Negotiations and Hiring Process

Once the organization is ready to make an offer, SGR can provide additional assistance to the client in the following areas.

Determine the Terms of an Offer

Upon request, SGR will provide comparative data for selected organizations, appropriate employment agreement language, and other similar information to assist you in determining an appropriate offer to extend to your candidate of choice.

Negotiate Terms and Conditions of Employment

SGR will assist to whatever degree you deem appropriate in conducting negotiations with the chosen candidate. SGR will determine and define any special needs or concerns of the chosen candidate, including anything that could be a complicating factor. SGR is experienced and prepared to help craft win-win-solutions to negotiation "log-jams."

Announcement/Press Release

Until you have “sealed the deal,” you need to be cautious in order to avoid the embarrassment of a premature announcement that does not work out. You also want to try to notify all senior staff and unsuccessful candidates before they read about it in the newspaper. SGR will assist with this coordination and with drafting any announcements or press releases.

Transition Strategy

There are a variety of transition issues when hiring a new executive. SGR will brief the client on transition issues that need to be addressed and will provide a recommendation on what actions to take. Together, we will create a transition strategy that builds the foundation for a successful long-term relationship.