

## TBG STANDARD SEARCH PROCESS

### Overview

The rigorous process described below has proven its ability to generate high-quality candidates in a reasonable amount of time, as long as a firm timeline is established up front. During the entire process, communication to key stakeholders is ongoing, confidentiality is maintained, and candidates are provided with updates on their status. It is possible to customize the process to best meet your needs.

The standard search process assumes the search committee wishes a significant level of involvement in the process, to include setting performance criteria, application screening, and conducting other screening activities such as interviews and reference checks. If this is not the case, a list of typical options is provided at the end of the process description. The fee established for the search will depend on the specific activities you wish The Bryan Group (TBG) to conduct, as well as the scope of those activities. TBG conducts searches for a fixed fee that is based on the actual time it takes to do the work.

### Major Search Elements

**PHASE I: Creating a Strong Search Committee Foundation**

**PHASE II: Identifying Superintendent Performance Criteria**

**PHASE III: Sourcing Qualified Candidates**

**PHASE IV: Screening Candidates**

**PHASE V: Preparing Candidate Recommendations for the Board**

After each element is described, optional activities are described.

### **PHASE I: Creating a Strong Search Committee Foundation**

1. Forming the search committee (SC) and developing it into a high-performing team with clear goals, expectations, roles, operating norms, team charter, search activity project plan, and timeline.
2. Identifying community engagement needs and providing the SC with guidance in the development and use of interviews, focus groups, surveys, and/or community forums to gather relevant stakeholder input. The breadth and depth of this activity depends on the perceived level of trust between the community and the school district – particularly leadership in terms of board and district administrator effectiveness.
3. Identifying and initiating a project communication and buy-in plan to keep key stakeholders up to date and to foster community building and buy-in for the process and final candidate recommendations.

**PHASE II: Identifying Superintendent Performance Criteria**

4. Conducting community data collection activities, e.g., surveys, focus groups, and individual interviews. TBG provides guidance, examples, and protocols.
5. Establishing detailed and measurable superintendent performance criteria that accurately reflect your district's unique characteristics and needs. The criteria include detailed descriptions and measures of role, competency, and leadership style proficiency. It also includes the creation of a derailer/failure factor model. These are attributes that will lead to failure for anyone in the position. It also includes the identification of fit requirements – with the leadership team, board, parents, students, faculty, community, etc. – and any specific experience requirements as well as specific credentials, e.g., degrees and certifications.
6. Evaluating the senior management team's capabilities against the superintendent performance criteria (as a group). No one has all the "right stuff," and understanding candidate competency assets and deficits in light of the team's strengths and limitations is an essential element in the final selection decision-making process.

**PHASE III: Sourcing Qualified Candidates**

7. Providing the SC with guidance in the creation of a job posting that incorporates the performance criteria, a description of district attributes that will appeal to job seekers, and application requirements with regard to documentation.
8. Providing the SC with targeted candidate sourcing options to include networking, proven job posting websites, newspaper placements, association newsletters, The TBG candidate pool, and candidate research that includes identifying and making contact with potential high-quality candidates not currently seeking a new position (optional). Should formal candidate research be required, the costs of this for a particular position will be included in the overall search fee. (The client pays travel, copying, and position postings expenses at cost.)

**PHASE IV: Screening Candidates**

9. Training SC members to screen application materials for the presence of the detailed and measurable performance criteria. The goal is to reduce the pool of candidates to 6-8 – these are the quarterfinalists.
10. Training SC members in the Guided Storytelling Interview™ (GSI) technique and how to conduct the short interview (60-75 minutes), which is done by tele-conference and recorded (by Zoom) for scoring purposes. Training is also provided in how to identify and evaluate the demonstration of role, competency, and leadership style performance criteria. The short interview reduces the number of candidates to the top three to four – the semifinalists.

11. Conducting the full Guided Storytelling Interview (GSI) with the semi-finalists. This is a three-hour teleconference interview that is recorded and scored with the SC for the demonstration of the performance criteria. This interview reduces the number of candidates to one to three – the finalist/s.
12. Providing the SC with guidance on scheduling activities for finalist visits to the district to meet with key stakeholders a formal “meet & greet.” This includes providing sample candidate evaluation forms for different stakeholder groups.
13. Providing the SC with guidance on conducting visits to candidate home sites. This includes an agenda of activities and evaluation protocol that will provide further insight into candidate capabilities.
14. Providing the SC with guidance and training on how to conduct GSI-based internal and external reference checks to generate information that can be scored against the performance criteria, and in particular, the derailers/failure predictors.

#### **PHASE V: Preparing Candidate Recommendations for the Board**

15. Providing the SC with guidance in the integration and analysis of all the performance data gathered from the screening of application materials, short interview, long GSI interview, site visit, and reference checks. It includes the leadership team capabilities fit assessment conducted earlier. Also included in this step is guidance on how to rank the finalists (if more than one) and how to package supporting information for recommendations to the Board.
16. Attending the presentation of candidate recommendations to the Board by the SC, to respond to any questions the Board may have about the process that led to the SC recommendations. (Optional – the SC may not see this as necessary.)
17. Providing the Board and SC with guidance on conducting criminal background checks.

#### **Conclusion**

As you can see from the steps above, a quality search takes time and commitment. Our team at TBG makes this experience as engaging and insightful as possible for your search committee throughout the process. Every search committee member gains valuable insights and skills pertaining to leadership and capacity-building that can be applied to future candidate searches and other areas of work beyond the search.

#### **Optional Search Activities**

Should you find the standard search process does not exactly fit your needs, some of the optional activities TBG can conduct include (for an additional fee):

- 1) Providing superintendent on-boarding advice and coaching to both the new superintendent and the Board. Having the superintendent quickly get off on the right foot is essential for everyone's success. This is a three-month (up to six) period that starts once the contract has been signed and includes activities such as:
  - Creating a highly functional position description that incorporates the performance criteria employed during the search.
  - Creating effective mutual performance expectations between the superintendent and the board.
  - Providing the superintendent with the search evaluation process results.
  - Designing a professional development plan in line with search feedback, district goals, and Board expectations.
  - Coaching to ensure that the new superintendent builds effective working relationships with key stakeholders, to include the external community, right out of the gate.
- 2) Conducting the community data gathering activities, e.g., surveys, interviews, and focus groups.
- 3) Screening all the applications.
- 4) Conducting all the short interviews.
- 5) Conducting all the internal and external reference checks.
- 6) Conducting formal background checks.
- 7) Designing and coordinating the finalist onsite visit.
- 8) Designing and coordinating visits to the candidate's home district.
- 9) Conducting an onsite leadership simulation that includes the finalist/s and key stakeholders.
- 10) Providing contract negotiation guidance.
- 11) It is also possible for TBG to do less of the search activities when you have the internal capacity to do them. In that case, the TBG fee would be reduced accordingly.

### **Traditional Search Option**

Should the Board decide the search process must be done as quickly as possible and that the search committee (SC) has neither the time nor desire to engage in most of the search process screening activities, TBG is prepared to do the search process work from start to finish, with the SC only in an oversight role and engaging in some of the candidate interviews near the end of the process. This option is somewhat higher cost.