4.3 Provide a detailed action plan to explain your approach and services offered for the as-needed executive-level searches and how you plan to incorporate the described scope of work.

Our standard search process is built upon years of experience, and is comprised of the following six steps, which we can of course tailor to the specific wishes and processes of the Oklahoma State University and the A&M System for each search:

1) **Organization of the Search:** A key determinant of a successful search is the thoughtful organization of the search process. Academic Search works side-by-side with the Oklahoma State University and the A&M System to set specific goals and develop operating guidelines to help structure the overall process. (Scope of Work A)

2) **Analysis of Institutional Needs:** Each search begins with a thorough analysis of the institution and the position requirements, during which the senior consultant(s) spends extensive time researching the distinctive history, culture, strengths, and challenges of that institution and the academic or administrative unit. The senior consultant(s) meets with key stakeholders, including—as applicable—trustees, president, provost, faculty, students, staff, alumni, and community leaders, listening carefully to their wants and needs. Once this information has been gathered during the pre-search campus visit, the senior consultant(s) will work quickly to develop a draft position profile, advertisement, and advertising plan for the search, which will be used in recruiting a diverse and qualified pool of applicants. Once drafted, these documents will be shared for review with the Search Committee and hiring authority and the senior consultant(s) will make any desired edits. The advertisement and profile are typically posted to Academic Search’s website and with Committee-approved print and/or online publications within a couple of weeks of the pre-search visit. (Scope of Work B, C)

3) **Recruitment of Strong and Inclusive Candidate Pool:** The third step is to build a candidate pool crafted for the specific search and preferred qualifications of the position. We cast a wide net to find the very best candidates, locally, nationally, and globally, and activate extensive networks to identify a broad and diverse group of candidates with the
desired attributes and experience. The senior consultant(s) will engage in active recruitment of potential candidates, through their personal networks and other outreach, by email, phone, and video or in-person meetings as needed. Applications are sent directly to Academic Search and kept on a secure website, to which only the Search Committee and the senior consultant(s) have access. (Scope of Work E)

4) Candidate Evaluation and Selection: The pace of the search escalates as the Committee begins to read and evaluate applications in order to identify semifinalist candidates. The senior consultant(s) will also offer to conduct a credential review exercise with the Search Committee. The purpose of this review is to prepare the Committee to evaluate applications using the position criteria previously identified. At this time, the Committee will also be introduced to the secure website. The site is password-protected to ensure confidentiality and houses all candidate application materials. A full-time director of technology services is available to respond to questions and trouble-shoot any technology issues throughout the search. (Scope of Work D)

The senior consultant(s) will return for the next meeting, at which the Search Committee will evaluate all applications, assessing the materials submitted by candidates in light of the desired capabilities outlined in the institutional profile. At this time, the senior consultant(s) will also assist the Search Committee in narrowing down the applicant pool to those most qualified for first-round interviews, referred to as semifinalist interviews and often held at a confidential, neutral site off campus. Calls to on-list references may be made at this stage or later in the process.

5) Interviews and Vetting of Candidates (Part 1—Semifinalist Interviews): Once the semifinalists have been chosen, interviews are scheduled. Semifinalist interviews can be conducted in person or through videoconferencing, according to the wishes of the Search Committee. In the event the Committee selects a video interview, Academic Search will provide the campus with logistical support for video conferencing platforms. Academic Search staff schedules the interviews and the senior consultant(s) is present to assist the Committee throughout the process.

Interviews and Vetting of Candidates (Part 2—Campus Visits): Following the first-round interviews and the selection of finalists by the Committee, the senior consultant(s) conducts background checks, including off-list reference calls on the finalists as well as degree verifications. All local arrangements for campus visits by finalists would be made by the Oklahoma State University and the A&M System, with assistance from Academic Search. (Scope of Work F, G)

6) Facilitation of the Appointment: Upon the selection of finalists, the senior consultant(s) continues to facilitate the final recruitment, selection and appointment process, assisting the Search Committee as needed, helping to announce the appointment publicly, as well as assisting with transition activities for the designated appointee.