# Recommended Steps for a Successful Search

Directions:Use this checklist as a guide to good practice. You can adapt any of these 38 steps to your unique needs.

| ✓ | **Step** |
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|  | 1. Review the department:Has an internal and/or external review of the department been organized? |
|  | 1. Decide the future direction of the department:Has all available information been reviewed to determine whether the department is in alignment with the organizational strategy, it needs to be realigned, or it should be closed? |
|  | 1. Define leadership competencies:Are the competencies sought in the new leader based on the history, reviews, and desired future directions of the department? |
|  | 1. Initiate the search process:Have decisions been made about whether to mount an external search and whether to use a search committee? |
|  | 1. Select the search committee chair:Has the search committee chair been selected by the dean, CEO, or hiring authority? |
|  | 1. Attend to administrative infrastructure:Has appropriate administrative support for the search process been arranged? |
|  | 1. Decide whether to hire a search consultant:Has the dean or CEO and search committee chair met with in-house search experts, and have they decided whether to hire an external search consultant? |
|  | 1. Appoint search committee:Has the dean or hiring authority gotten input on search committee membership from key stakeholders? |
|  | 1. Announce the search:Has the institutional community been informed that a national search for new leadership will be conducted? |
|  | 1. **Schedule the first meeting:** Have the committee chair, search committee administrator, and dean’s administrator identified and announced the date for the first search committee meeting? |
|  | 1. **Create an agenda for the first meeting:** Has the search committee chair prepared an agenda for the first meeting? |
|  | 1. **Create and arrange for advertising:** Have appropriate national (and possibly international) journals, academic news publications, and Web sites of relevant professional associations been identified to advertise the position? |
|  | 1. **Write letters requesting nominations:** Has the committee identified individuals to whom to send the search announcement and a request for names of individuals to be nominated for the position? Have those people been contacted? |
|  | 1. **Establish a search network:** Has the search committee chair identified and made calls to establish a network of advisors and mentors? |
|  | 1. **Establish a log:** Has the committee administrator established a log for recording nominations, letters sent to candidates, replies received from candidates, curricula vitae received, and committee actions? |
|  | 1. **Acknowledge nominations and applications:** Has the committee administrator sent acknowledgments to people who submitted nominations? |
|  | 1. **Develop a candidate evaluation form and score sheet:** Has the search committee agreed on evaluation criteria based on the requirements for the position and constructed a candidate evaluation form and a score sheet? |
|  | 1. **Provide unconscious-bias training:** Has training been provided to the committee and interviewers on the effects of unconscious bias in the search and evaluation process, and have steps been taken to mitigate its effects? |
|  | 1. **Call reluctant candidates:** Has the search committee chair called leading candidates who have not responded or who have declined to become candidates? |
|  | 1. **Select candidates for first-round interviews:** Has the committee identified the “short list” of candidates to be invited for first-round interviews? |
|  | 1. **Communicate with selected candidates who were not selected:** Have the candidates not selected been thanked for their interest? |
|  | 1. **Make arrangements for first-round interviews:** Has the search committee decided if initial interviews will occur on campus or if the committee will travel to a neutral location and interview all the candidates on the same day? |
|  | 1. **Develop interview questions:** Has the committee developed a list of core questions based on criteria on which the candidates are to be evaluated and decided which committee member will pose each question? |
|  | 1. **Decide who will meet and interview the candidates:** For on-campus interviews, has the search committee chair decided who will be invited to meet with the candidate? |
|  | 1. **Provide interviewing training:** Have the search committee and all interviewers received training on effective interviewing techniques and on how to ask behavioral questions? |
|  | 1. **Interview candidates and write evaluations:** Have all interviewers submitted written evaluations on each candidate? |
|  | 1. **Identify semifinalists:** Has the committee identified the candidates to be invited for a second interview? Have the candidates not selected been thanked for their interest? |
|  | 1. **Ensure that key players are included on the second-round interview schedule:** Has the search committee scheduled opportunities for the key players and constituencies (e.g., the dean and CEO, department faculty, residents, students) to meet the candidate? Has the candidate’s spouse or partner been invited? |
|  | 1. **Hold seminars and social gatherings:** Has the search committee decided whether the candidate should give a seminar, participate in a “town meeting-style” social gathering, and/or be given opportunities for social interaction with other institutional leaders? |
|  | 1. **Conduct interviews, collect reviewer evaluations, and identify finalists:** Following each interview, have all interviewers submitted written evaluations on each candidate? Have finalists been identified? |
|  | 1. **Make reference calls:** Has one person been designated to make reference calls to national and local colleagues familiar with each of the finalist candidates? Has a standard set of questions been prepared for the reference calls? |
|  | 1. **Create and present list of finalists:** Has the search committee reviewed the results of the reference calls and decided on a final, alphabetized list to present to the dean, CEO, or hiring authority? Does the final list include a comparative analysis of the relative strengths and weaknesses of each finalist? |
|  | 1. **Contact additional references:** Has the dean or CEO contacted additional national references (e.g., deans, hospital leaders, department chairs, or center directors the hiring authority knows personally) to further evaluate the finalists? |
|  | 1. **Decide whether to continue the search or to select:** Has the dean decided whether to arrange a third visit for the finalists (or a subset of the group) or to select the first-choice candidate? |
|  | 1. **Develop mutual understanding of position and resources:** Has the dean prepared the offer and come to a mutual understanding with the leading candidate about the terms of the offer and the opportunity? |
|  | 1. **Communicate with unsuccessful finalists:** Once the candidate has accepted the offer, has the search chair communicated with unsuccessful candidates to let them know they were not selected and to thank them for participating in the search? |
|  | 1. **Announce the search outcome:** Has the successful outcome been announcedto the community and publicly? Has the dean thanked the search committee, its chair, and all those involved in the process? |
|  | 1. **Plan for transition and onboarding:** Have plans been made for the leadership transition and onboarding of the new department chair? |