



## **EXHIBITS 1 & 2**

### **Oregon Health & Science University**

Leadership Recruitment Firms / RFP-2024-0018

**Date:**

June 24, 2024

**Partner Firm:**

Summit Search Solutions, Inc.

P.O. Box 9824

Asheville, NC 28815



## EXHIBIT 1

### SCOPE OF WORK SUMMARY

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Summit Search Solutions, Inc. is a boutique executive search firm that specializes in senior-level searches in the higher education sector. Based in Asheville, NC, Summit has a diverse team of experienced recruiting consultants in strategic locations across the country including California, Colorado, Kansas, Maryland, New York, and North Carolina. Collectively, our team has led over 1,000 searches in the sector. Summit's growth has been 100% organic, based on repeat business and client referrals. Our nearest associate to Portland resides in Sacramento, CA.

Summit is a Women Business Enterprise (WBE) in Oregon – certificate #11214 and nationally certified by WBENC.

Summit would like to continue its partnership with OHSU in providing recruitment services for C-Suite, Executive, and other leadership positions in the realms described as academic, research, healthcare, and enterprise leadership roles. The goal is to provide a pool of highly qualified, diverse candidates who share OHSU's vision, mission, and principles. We agree to provide all retained search services listed in the RFP on page 4 (B. Scope of Work). We can provide services for interim, short term, and regular roles.

#### **Roles and Expectations for OHSU and for Search Firm**

Summit will act in the role of partner to OHSU. Our partnership will be centered around mutual respect, values of collaboration, transparency, forthrightness, and humility. Summit's lead search consultant will collaborate with the search committee chair on key tasks such as developing the position profile, identifying key stakeholders for any listening sessions, determining appropriate venues for posting ads, preparing agendas for search committee meetings, developing interview questions, supporting committee members in their evaluative work, collecting feedback, and drafting memos for the hiring executive. The consultant will be in regular communication with the search chair, providing project status reports, and offering weekly check-in meetings. Summit will strive to manage communication in a timely manner and to meet stated timelines and targets. If a search is struggling, we bring these issues to the attention of the search team, discuss proactively, and make recommendations for adjustments as needed.

Summit asks from OHSU that all information and materials furnished by Summit related to candidates be held in strict confidence. Summit requests that OHSU not disclose any information or materials to a candidate's current or former employers and co-workers without the candidate's consent. Summit asks that OHSU react to materials provided by Summit in a timely manner.

**For reference, below we have detailed each step of the search process/scope of work:**

## **PREPARATION**

- Position and needs are analyzed during an intake process that involve listening sessions with key stakeholders.
- Summit will share insights from the intake process with the hiring executive and the search committee. These insights will help the University identify key areas that new hire will need to develop and/or focus on. This information will inform the development of the position prospectus (job announcement).
- The position prospectus and marketing materials will be created and approved.
- The recruiting strategy will be formulated.
- The search timetable will be finalized.

## **RECRUITMENT**

- Extensive, nationwide, inclusive sourcing strategies are employed that involve advertising, networking, and passive candidate outreach. Diversity sourcing strategies are implemented for all projects.
- EEO and related data is tracked for all applicants and reports to clients can be generated ad hoc throughout the process.
- Summit will utilize formal and informal mechanisms for disseminating information about the position. Passive sourcing - tapping those individuals in “like or feeder roles” who may not be actively looking - is essential to success and greatly enhances the quantity and quality of the candidate pool.

## **EVALUATION**

- Applicants will submit materials via a secure web-based portal. The portal allows Summit to move candidates through five levels. Applicants come in at Level 1.
- Credentials will be reviewed by Summit and those who meet minimum criteria will be advanced to Level 2 for further vetting by Summit.
- Top prospects will be screened, interviewed, and evaluated by Summit, based on criteria agreed to by the search committee. Select candidates will be moved to Level 3 in the system.
- After the application window is closed, Summit provides access to the portal for the search committee to access candidate materials. The system allows search committee members to rate their interest in the recommended (Level 3) group of candidates. Summit creates a summary report that the committee uses as a decision-making tool to narrow the candidate pool to focus on the top prospects.
- Note: Even though we encourage the search committee members to focus on the candidates we advance to Level 3, search committee members are able to view all applicants at all levels and are welcome to ask questions or make cases to consider candidates they wish to advocate for. Final decisions on candidate statuses always rest with the committee.

## **SEMIFINALIST INTERVIEWS**

- Summit helps to create interview questions/protocol for search committee use.
- Scheduling of interviews occurs.
- Semi-finalist interviews occur (typically video-based). The Summit project leader will participate.
- Search committee debriefs and makes a recommendation of finalists to the hiring authority.
- Finalists are recommended. The hiring executive reviews the committee’s recommendation and selects finalists.

## **FINALIST INTERVIEWS**

- Coordination and implementation of campus visits for finalist candidates occur.
- Data is collected and reporting for strengths and concerns for each finalist candidate is made.
- Reference checking and background checks are completed.

## **SELECTION & NEGOTIATION**

- Organization feedback is assessed.
- The offer is presented to the candidate and details negotiated.
- Start date and onboarding plan are crafted.

# EXHIBIT 2

## Pricing and Guarantees

Please note: Aside from the fees and expenses we propose, no other costs will accrue to OHSU for the proposed services.

### COMPREHENSIVE MODEL

The comprehensive model is a retained model that provides full service to OHSU during the entire process – pre-search listening sessions, prospect research, outreach/recruiting, assessment, candidate profiling, candidate management, as well as comprehensive reference and background checking and offer negotiation. This model may involve consultant travel to the university and involve meetings with key organizational leadership and identified stakeholder groups throughout the process. **This model offers a full guarantee.**

<b>Project Fee</b>	Project fees range from 25-27% of the selected candidate's first year base salary. Fee ranges can be converted into a fixed fees and agreed to by all parties up front.
<b>Administrative Fees</b>	<b>There are no administrative fees.</b> <i>Note that most firms charge administrative fees that often fall in the 10%+ range; Summit does not engage in this practice.</i>
<b>Consultant Travel</b>	Visits to campus are billed back at cost. This search can be implemented virtually if desired.
<b>Additional Expenses</b>	<ul style="list-style-type: none"><li>Advertising and posting fees (usually \$2,500-\$3,500) are billed back at cost.</li><li>Background checks (varies – billed back at cost). These usually run \$300-500 per.</li><li>Web/press/social media search check is optional (facilitated by a specialized external provider) - \$350 per candidate.</li></ul>
<b>Guarantee</b>	Full guarantee. If the search needs to be re-done within the first 12 months, we will repeat the search on an expenses-only basis (no project fee).

## Standard Warranty

Comprehensive/retained search offers a full guarantee.

### Description Of Warranty Terms

If the search for the same position needs to be re-done within the first 12 months, we will repeat the search on an expenses-only basis (no project fee).

### Payment Schedule:

- OHSU will pay the first third of the fee to Summit as the contract is executed.
- The second third of the project fee will be due upon confirmation of a semi-finalist slate of candidates.
- A final invoice (the final third project fee plus reimbursable expenses) will be due upon committee confirmation of the finalist slate.

NOTE: OHSU will cover all candidate-related travel expenses. These typically include airfare, lodging, and related travel expenses for visits to campus during the process.

## ADDITIONAL INFORMATION REGARDING EXPANDED SERVICE OFFERINGS:

Summit offers three (3) service models. OHSU had utilized all three over the years, and so we felt it pertinent to outline these in this proposal. Summit also offers assessment and leadership coaching services.

### Service Models

STEPS IN SEARCH PROCESS.	Comprehensive	Sourcing Plus	Sourcing Basic
Intake & Strategy Development	✓	✓	✓
Position Profile & Marketing Materials Developed	✓	✓	✓
Recruitment Advertising & Position Postings	✓	✓	✓
Prospect Research & Specialized Sourcing Implemented	✓	✓	✓
Outreach to Active and Passive Candidates	✓	✓	✓
Candidates Interviewed & Assessed	✓	✓	✓
Presentation of Candidates	✓	✓	✓
Semifinalist Selection	✓	✓	✓
Semifinalist Interview Coordination	✓	✓	
Selection of Finalists	✓	✓	
Reference & Background Checks	✓	Negotiable	
Offer Presentation & Negotiation	✓		
Onboarding Planning	✓		
Guarantee	Full	Partial	Discounted

Pricing and guarantees for additional models are presented below. Please note: Aside from the fees and expenses we propose, no other costs will accrue to OHSU for the proposed services.

## Sourcing Plus Model

Sourcing Plus is a modified search (relative to a traditional, comprehensive search) that focuses on marketing the position, attracting a high-quality candidate pool, and working with the client and/or search committee in selecting the best candidates to pursue. Sourcing Plus follows the comprehensive model through the selection of finalist candidates. Once finalists are selected, the client takes the lead in managing pieces of the search, although the project leader stays close to the candidates, committee chairs, search coordinators, and hiring authorities through the finalist stage of the process to ensure a successful conclusion.

Services are provided on a fixed-fee basis. There are no additional administrative fees. Consultant travel to your site is optional and charged back at cost. Expenses (advertising) are charged back at cost. **Sourcing Plus offers a partial guarantee.**

<b>Project Fee*</b>	Project fees typically equate to 18-20% of the projected starting base salary converted to a fixed fee. Most projects fees using this model end up in the \$30,000-\$45,000 range.
<b>Administrative Fees</b>	<b>There are no administrative fees.</b> <i>Note that most firms charge administrative fees that often fall in the 10%+ range; Summit does not engage in this practice.</i>
<b>Consultant Travel</b>	Billed back at cost. The project can be completed entirely virtually, or it can include an initial visit by Summit to participate in the intake meetings in person and a tour of the campus.
<b>Additional Expenses</b>	<ul style="list-style-type: none"> <li>Advertising and posting fees (usually \$2,500-\$3,500) are billed back at cost.</li> <li>Background checks (varies – billed back at cost). These usually run \$300-500 per.</li> <li>Web/press/social media search check is optional (facilitated by a specialized external provider) - \$350 per candidate.</li> </ul>
<b>Partial Guarantee</b>	Partial. If the search needs to be continued or redone within the first 12 months, we will do so at 30% of the original project fee.

## Sourcing Basic Model

Sourcing Basic focuses on marketing the opportunity and building the candidate pool. This model is offered in limited circumstances where Summit takes direction from the hiring manager to source candidates for a defined niche role. Candidates that are submitted to the client are pre-qualified based on key criteria. Summit leads the process up through the selection of semi-finalist candidates. Services are provided on an hourly or fixed-fee basis and are implemented virtually. Expenses are charged back at cost.

<b>Project Fee</b>	Offered at \$150/hour or priced as a fixed fee.
<b>Administrative Fees</b>	<b>There are no administrative fees.</b> <i>Note that most firms charge administrative fees that often fall in the 10%+ range; Summit does not engage in this practice.</i>
<b>Consultant Travel</b>	None
<b>Additional Expenses</b>	Advertising and posting fees (usually \$2,500-\$3,500) are billed back at cost.
<b>Guarantee</b>	No guarantee provided, but Summit will negotiate a discounted rate if the work needs to continue beyond the original contract.