

Executive Search Services

"I can't tell you how good it feels to have Jay here! He is diving in deep and it is already apparent that he is exactly what we need to help launch us successfully into this new phase. He will be a valued member of our leadership team and is an overall great fit for our organization. Great job to Schaffer&Combs! Many, many thanks!"

--Annette Eros, CEO Ronald McDonald House at Stanford

According to a 2013 study by Compass Point, attracting and retaining talented leaders has never been a greater challenge. To meet this escalating challenge, Schaffer&Combs (S&C) is unusually well positioned to source and engage outstanding talent: S&C has decades of experience in the execution of the management functions for which we recruit and has deep networks in the social enterprise, nonprofit, and for profit sectors. In short, S&C does not stand outside the industry, as do traditional recruiters, but is deeply connected on multiple levels.

S&C Executive Search Service and Methods

- Because the perfect candidate is usually found among professionals happy in their present jobs, rather than among job seekers, S&C understands that your organization's opportunity must be communicated in the most compelling fashion possible:
 - S&C goes to unusual lengths to consult with your organization's leadership and key stakeholders in order to deeply understand your story, culture, strategic outlook, and the ways in which the position plays an important role
 - S&C believes brand management to be an integral part of successful Executive Search, and we pride ourselves on taking the extra time necessary to be sure we represent your organization accurately and persuasively
- Working with your leadership to the extent necessary or desired, we help you finalize a compelling job description that reflects the attractiveness and excitement of the opportunity
- S&C provides experienced feedback and consultation on the compensation structure of the position, if needed
- S&C leverages its extensive contacts in relevant professional communities
- Our team performs Executive Search and recruiting techniques tailored to your needs, such as:
 - Profiling similar organizations, followed by discreet, executive-level outreach to relevant individuals
 - Use of S&C private, online, and other professional resources and

- networks to augment candidate pool
- Personal cultivation of targeted individuals by S&C principals
- Finally, we judiciously use traditional employment posting resources to augment the candidate pool

Typical Work Phases

- **Consultation:** We engage key individuals in your organization (executive team, board of directors) in order to clearly define the particular executive role, gain alignment around the factors for success, develop a deep understanding of the current needs of the organization as well as the challenges and opportunities being faced, produce an externally facing position description, and finalize a compensation framework.
- **Search:** Our search efforts are conducted in the following primary ways:
 - We appropriately leverage our extensive network of thousands of professional contacts, in addition to your own network, to alert influencers to the opportunity, generate valuable referrals, and identify potential candidates.
 - With our knowledge of your organization and our role in jointly crafting the position description, we profile other organizations, nonprofit and for-profit, where ideal candidates may be currently employed. Our research associates identify relevant individuals, and S&C principals confidentially initiate contact with and cultivate interest from potential candidates.
 - We augment this effort with the judicious use of sector-specific executive job listing sites and posting venues, such as Bridgespan and LinkedIn.
- **Review of Materials, Phone Interviews:** S&C personnel review submitted materials relative to the job description, and candidates whose credentials appear to be a fit are asked to participate in 1-2 phone interviews, the goal of which is to narrow a field of potentially hundreds of candidates to a select list of “semi-finalists”--high potential candidates who are invited to engage in in-person interviews with senior S&C representatives.
- **In-person Interviews:** Several “semi-finalist” candidates will be invited to interview in-person with S&C executives. Our principals are expert interviewers, having personally recruited and hired hundreds of executives, and will develop an interview approach tailored to the needs your organization, and one most likely to identify finalists from the process. Throughout the process,

S&C operates with utmost discretion, for the benefit of the candidates as well as your organization.

- **Finalist Selection, Presentation, and Client Interview Management:** Our principals, in consultation with your organization, will narrow the field to a slate of finalists and formally present these individuals' qualifications and relative scoring (against a matrix of factors derived from the position description) to your organization, along with a narrative "profile" of each candidate. At this stage, we design and suggest a finalist interview format and approach for your organization and assist with scheduling and other logistics as necessary. To the degree acceptable to your organization, we offer contextual interviewing advice in order for you to most effectively determine the potential long-term fit of each candidate, and we may also join for interviews upon request.
- **Testing, References and Background Checks:** If personality or other testing is requested for one or more finalists, we will provide support and coordination. One of the values of executive search is to present a diverse spectrum of candidates to your organization; in this regard, we strive to keep test results as only one factor in our recommendation. Some hiring executives and search firms allow a test result to make the final decision, a strategy we do not embrace as we feel it diminishes the opportunity to assemble a complementary management team. At a minimum, S&C will perform confidential reference checks and may coordinate background checks for the selected finalist(s) from reputable third party providers, upon request.
- **Offer Construction and Negotiation:** S&C provides high value in terms of designing a compensation offer within your organization's general framework, tailored to the specific context of the selected finalist candidate, and will assist you in negotiating as necessary. We can serve as an effective, dispassionate buffer between your organization and the candidate during this process.
- **Closure with Other Finalists and Follow-up with New Executive and Your Organization:** We will professionally manage the sign-off and debrief with all non-selected finalists in a courteous manner, maintaining the reputation and brand of your organization. We remain on-call to you and the new executive during the months following start date to render support in the onboarding process as necessary. To this end, we suggest monthly check-ins during the first quarter, and quarterly for the remainder of the first year.

Client Examples and References

S&C has provided, and continues to provide, human capital solutions for some leading organizations in a variety of sectors and locales. Client examples and references are available upon request.

Timing

On average, the executive search process, from initial consultation to first day of work, takes 3-4 months, but can, at times, move much more quickly than this. We will strive to work as quickly as possible without sacrificing a diligent, patient approach to finding the right individual for this critical role.

Pricing

Our Executive Search fees for a full search are based on 25% of total first year compensation for the position.

We place $\frac{2}{3}$ of our fee “at risk,” and contingent on performance, as follows:

- o $\frac{1}{3}$ of total fee due at beginning of project
- o $\frac{1}{3}$ due when finalist slate presented (contingent portion of fee)
- o $\frac{1}{3}$ due upon successful acceptance of offer (contingent portion of fee)

S&C can also support tailored partial search services, including assistance with one or more of the areas described above, for a flat fee in the range of \$10,000-\$15,000.

Schaffer&Combs Team and Partners

S&C will provide dedicated project team to deliver this engagement, led by one or more of our partners, and supported by staff members with relevant experience.

Learn more about these professionals at:

schaffercombs.com/who-we-are/our-team/

Partners:

James Lee, has a deep background in both the nonprofit and business communities, having led education-focused nonprofits, built a business as a private sector entrepreneur, and developed strategy, programs, and organizations as a senior executive, board member, and consultant. James has designed fundraising strategies and led teams to collectively raise hundreds of millions of dollars for leading nonprofit organizations. Prior to joining Schaffer&Combs, James worked in the charter school education sector, helping both KIPP and Leadership Public Schools in a strategic fundraising capacity. Previously, James helped lead The BizWorld Foundation as its Vice President of Programs and was with The Junior Statesmen Foundation, where he served as a board member, Program Director, and Director of Alumni Relations and Development. A graduate of Princeton University, James began his career at McKinsey & Company and then ran his own multi-million dollar business. James is also an adjunct professor of consulting at the University of San Francisco School of Management, a cofounder of Knowmia, an award-winning Y Combinator education technology company, and is a member of the Full Circle Fund, a venture philanthropy organization. He is a frequent speaker on strategy, consulting, impact, fundraising, startups, and board development.

LinkedIn profile: <http://www.linkedin.com/in/jamesvlee>

James Schaffer, as a management consultant in the 1990s, spent several years conducting executive-level organizational design for major, global corporations, such as ICI Glidden, Sherwin-Williams and The Scotts Company. He transitioned to the SME sector in 2000, working as a valuation consultant before being named CEO of Global Data Vault Corporation in 2002, where he was tasked with creating a leading data security brand in an intensely competitive emerging market. When the company was acquired in 2006, it was serving 1,000 business customers in the US and Europe, and had garnered the #1 Google ranking for “offsite data storage.” Today at Schaffer&Combs, James’s focus is helping emerging, high growth organizations adopt effective practices in key functions, strategic and operational. James is also a principal at Impact Capital Group, an advisory firm focused on equity investments in social impact real estate and technology. He is a frequent speaker, contributor and mentor in venues such as the Commonwealth Club of California, SOCAP, and

HansonBridgett Sustainable Business Leadership Forum. James earned a B.A. degree from The College of William and Mary.

LinkedIn profile: <http://www.linkedin.com/in/jamestschaffer>

Arthur Combs, PhD, began his career as a commodities broker and earned a doctorate from the London School of Economics. He has worked in economic development since 1984, with significant experience in both developing world and domestic settings. An experienced corporate leader, Arthur served as founding CEO of Source Healthcare Systems, a California-based application service provider. He has also led a number of nonprofit organizations as Executive Director and founding board president. Today, Arthur advises clients in multiple areas: interim management, organizational assessment and design, strategic planning, impact assessment, fundraising, board development and governance; program management, and grant-making. He has a successful track record in the economic development, global health, research, and corporate governance.

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