

Senior Leadership Search Process Responsibility (RACI) Matrix

Transition Search Partners Quick Guide

This roadmap draft is intended as an example.

It should be tailored to the specific needs of the client.

R	Responsible: Does the work
A	Accountable: Makes the decision
C	Consulted: Must provide input prior to decision
I	Informed: Must be informed of decision
n/a	Not applicable: This party is not involved in this step.

Steps align with the steps in Lydia Musher's

Hire a Head of School With or Without a Search Committee

Please see TeamGantt for more on RACI matrices.

PHASE 1: Research		Board (President)	Committee (Chair)	Consultant (Primary)	Consultant (Admin)
0	Prepare and execute calendar and communication plan				
	Prepare calendar	A	C	R	I
	Prepare communication plan	A	C	R	I
	Execute communication plan	A	C	R	I
	Refine communication plan to achieve objectives	A	C	R	I
1A	Prepare research for search				
	Gather documents about client for later use	A	R	C	I
	Analysis of client's current position and needs (Baldrige)	C	C	R	I
	Meet with stakeholders (typically 50+)	n/a	C	R	I
	Prepare and submit short report to search committee	I	I	R & A	I
1B, 1C	Prepare for and execute committee kickoff meeting				
	(1B) Gather and present leader profiles of relevant competitors	n/a	C	R	I
	(1C) Assemble, enlist, and convene search committee	A	R	C	I
	(1C) Gather and present priorities survey	C	A	R	I
	Facilitate kickoff meeting	C	A	R	I

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PHASE 2: Advertising		Board (President)	Committee (Chair)	Consultant (Primary)	Consultant (Admin)
2A	Write an enticing job description				
	Write initial draft	n/a	C	R & A	I
	Review with optimization tools	n/a	I	R & A	I
	Final approval	C	A	R	I
	Distribute to personal networks	R & A	R & A	R & A	I
2B1	Make everyone in the world aware of it: Mass advertisement				
	Create advertising plan	C	I	A	R
	Execute advertising plan	n/a	I	A	R
	As desired, facilitate advertising webinars	n/a	I	A	R
	Measure effectiveness of advertising plan & refine	n/a	I	R & A	C
2B1	Make everyone in the world aware of it: 1-on-1 outreach				
	Create custom list of 100+ candidates/connectors	n/a	I	A	R
	Email/call 100+ candidatees/connectors	n/a	I	A	R
	Measure effectiveness of outreach plan & refine	n/a	I	R & A	C
2	Prepare and submit weekly reports to search committee	n/a	I	R & A	C

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PHASE 3: Selection		Board (President)	Committee (Chair)	Consultant (Primary)	Consultant (Admin)
3A	Screen resumes on your applicant tracking system				
	Review resumes in ATS	n/a	C	R & A	R
	Select candidates for phone screen	n/a	A	R	I
	Prepare questions for phone screens	n/a	C	R & A	I
3B	Talk to candidates by phone or video call yourself (phone screen)				
	Consultant conducts phone screens	n/a	C	R & A	C
	Search committee co-chairs conduct phone screens	n/a	R & A	C	R & A
	Select candidates for selection by committee	n/a	A	R	I
3C	Present ten or more candidates to the search committee				
	Train interviewers on behavioral interview process	n/a	C	R & A	I
	Prepare interview questions and scoring rubric	n/a	C	R & A	I
	Prepare and distribute resume information to committee members	n/a	C	A	R
	Present candidates, facilitate equitable decision-making process	n/a	A	R	R
	Select candidates to move to next round	n/a	R & A	C	I
	Follow up with candidates regarding next steps/disposition	n/a	C	A	R
3D	Prepare for and conduct semi-finalist video interviews with the search committee				
	Train interviewers on behavioral interview process	n/a	C	R & A	I
	Prepare interview questions and scoring rubric, distribute to committee	n/a	C	R & A	I
	Prepare and distribute candidate information to interviewers	n/a	I	A	R
	Present candidates, facilitate equitable decision-making process	n/a	A	R	R
	Select candidates to move to next round	n/a	R & A	C	I
	Follow up with candidates regarding next steps/disposition	n/a	I	A	R
3E	Invite exactly three finalists to campus to meet the community				

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- Conduct preliminary background checks of finalist candidates
- Train interviewers on behavioral interview process
- Invite stakeholders to on-campus/online meetings
- Prepare and distribute candidate information to interviewers
- Pre-negotiate "term sheets" with three finalists
- Distribute feedback survey, analyze, and present to committee
- Select candidate to hire
- Follow up with candidates regarding next steps/disposition

3 Prepare and submit weekly reports to search committee

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R & A	R & A	C	I
I	I	R & A	I
I	C	A	R
n/a	I	A	R
R & A	R & A	C	I
n/a	A	R	R
n/a	R & A	C	I
n/a	I	R & A	C
n/a	I	R & A	C

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PHASE 4: Hire & Transition		Board (President)	Committee (Chair)	Consultant (Primary)	Consultant (Admin)
4A	Negotiate a well-aligned contract	R & A	C	C & I	I
4B	Set SMART goals – collaboratively	R & A	n/a	C & I	I
4C	Transition your new leader to the community	R & A	n/a	C & I	I

For more on hiring and transition, please see the Tradition Search Partners Head of School Transition Roadmap.

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