



Notice of Statewide Contract Award

Official signed contract documents are on file with OMES-Central Purchasing.

Contract Title: Executive Search Services

Statewide Contract # : SW 0120

Contract Issuance Date: 2/26/2020

Total Number of Vendors: Two (2) *(For details see: Vendor Information Sheet)*

Contract Period: 02/21/2020 through 02/20/2021

Agreement Period: 02/21/2020 through 02/20/2023

Authorized Users: All State Departments, Boards, Commissions, Agencies and Institutions,
in addition to Counties, School Districts and Municipalities which may
avail themselves of this contract.

Contract Priority: This is a Mandatory Contract

Type of Contract: Firm, Fixed Price, Indefinite Quantity

OMES-CP Contact: Theresa Johnson

Title: Contracting Officer

Phone: 1 - 405 - 521 - 2289

Email: theresa.johnson@omes.ok.gov



Awarded Supplier Information

Supplier Name: Switchgear Search & Recruiting LLC

Supplier ID #: 0000395978

Supplier Address: 201 W 5 ST Suite 300

City: Tulsa

State: OK

Zip Code: 74103 -

Contact Person Name: Liz Brolick

Phone #: 918-707-5792

Title: CEO

Fax #: 918-574-8751

Email: liz@switchgearrecruiting.com

Website: www.switchgearrecruiting.com

Contract ID #: 5739

Delivery: FOB Destination

Minimum Order: NONE

P/Card Accepted: ☐ Yes ☒ No

Other:



Awarded Supplier Information

Supplier Name: Greenwood/Asher & Associates, Inc.

Supplier ID #: 0000486664

Supplier Address: 42 Business center Drive, Suite 206

City: Miramar Beach

State: FL

Zip Code: 32550 -

Contact Person Name: Jan Greenwood

Phone #: 850-650-2277

Title: President & Partner

Fax #: 850-650-2272

Email: jangreenwood@greenwoodsearch.com

Website: www.greenwoodsearch.com

Contract ID #: 5740

Delivery: FOB Destination

Minimum Order: NONE

P/Card Accepted: ☒ Yes

☐ No

Other:

CONTRACT AWARD DOCUMENT FOR
STATE OF OKLAHOMA CONTRACT WITH SWITCHGEAR
RESULTING FROM SOLICITATION NO. #0900000380

This Contract Award Document (:Contract Award”) is the document awarding the Contract to Switchgear Search & Recruiting by State of Oklahoma (“State”) in connection with Solicitation 0900000380 subject to the following terms set out below and is effective upon the date of the last signature below.

Recitals

Whereas, the State issued a Solicitation for proposal to provide Executive Search Services as more particularly described in the Solicitation;

Whereas, the State and Switchgear have negotiated the final terms and conditions under which Switchgear will provide the related services under the Contract.

Now, therefore, in consideration of the foregoing and the mutual promises set forth herein, the receipt and sufficiency of which are hereby acknowledged the parties agree as follows:

Contract Award Purpose. This Contract Award memorializes the agreement of the parties with respect to negotiated terms of the Contract that is being awarded to Switchgear as of even date with executive of this Contract Award. The parties agree that Switchgear has not yet begun performance of work contemplated by the Solicitation. The parties agree that any and all exceptions to the Solicitation in Switchgear's response that are not memorialized in this Contract Award are not accepted by State and will not become part of the Contract. All exception to the Solicitation included in Switchgear's response and Statement of Work are superseded and replaced in entirety by this Contract Award.

SCOPE OF WORK: EXECUTIVE SEARCH SERVICES

Vendor shall conduct searches for qualified candidates for various positions in various agencies at the State of Oklahoma.

Searches shall include a wide range of specialty practices including, but not limited to, information technology, engineering, education/ not-for-profit/ associations, accounting/financial services, and other professional services.

Vendor shall utilize nationwide searches if necessary to identify the candidates that are best qualified to meet the State of Oklahoma's needs. Vendor shall attract, interview and submit qualified candidates to the State.

Vendor shall work in close consultation with the State of Oklahoma agencies during this search.

I. Vendor's Responsibilities in the process include:

A. **Develop an Understanding of the Need.** Vendor will meet with and solicit input from requesting Agency to understand the requirements for the position. Vendor will meet with any/all parties involved in the hiring process including but not limited to the Hiring Manager, the Board, the Human Resources department and/or others.

This will include candidate qualifications such as professional credentials, personal characteristics, and background. This will also include information specific to the State Agency

such as current culture, leadership styles, growth potential within organization and any other information deemed relevant to the search. The understanding of the need will also include a detailed description of the State Agency's hiring process for the position.

B. Develop Position Specifications. Draft a specification (job description) for the position based on the State of Oklahoma's existing position descriptions, discussions with the requesting agency, and previous search histories if applicable. Position description shall describe the responsibilities, title, reporting relationships, compensation, education and experience requirements of the position. The position description will accurately describe the outcomes and goals as well as competencies that fit with both the culture of the Agency and the role. These details will be reviewed and authorized by the requesting Agency at the State of Oklahoma.

Vendor will create a scorecard to provide a clear link between the people being considered for the role and what they need to accomplish. The scorecard includes the position's mission, outcomes and competencies. The mission is the job's core purpose. Outcomes describe what the person needs to accomplish in a role. Most jobs have three to eight outcomes, ranked in order of importance. Competencies ensure the behavioral fit.

C. Identify Qualified Candidates. Vendor shall use their resources to undertake an intensive search to locate candidates whose qualifications match the position requirements on the Position Specification. Vendor will source candidates through a number of different channels including: proactively reaching out to candidates in the marketplace that may not be actively seeking the position, accessing vendor firm's network of qualified candidates, utilizing networking groups and organizations to connect with potential candidates and other best practice recruitment strategies utilized in the industry. Vendor will also reach out to potentially appropriate candidates the State is already otherwise aware of to obtain indications of interest.

D. Communicate with State. Vendor will set up regular scheduled reporting's of updates on search process. Vendor will advise the State of Oklahoma promptly and offer alternative courses of action if it becomes apparent that no qualified candidates can be presented, or that the length of the search will differ considerably from that originally specified. Vendor will provide the WWR reports weekly as required.

E. Qualify Candidates. Vendor will qualify candidates by resume review, interviews and scorecard grading to obtain a thorough understanding of their accomplishments, capabilities, and potential. The vendor will utilize the Top-Grading hiring method. The Top-Grading method includes the following steps:

1. *The Screening Interview:* This interview is a short, phone call designed to clear out B and C players from the initial roster of candidates.
2. *The Top-Grading Interview:* This interview is an in-person, highly detailed interview. It's a chronological walk-through of a person's career allowing Vendor to gather an immense amount of decision data points. If the candidate isn't local, this can be done with FaceTime or Skype.
3. *The Reference Interview:* Vendor will conduct reference checks with managers, peers, subordinates and/or customers of the candidate. Eight to fifteen references per candidate will be conducted.

F. **Present Best Qualified Candidates to the State of Oklahoma.** Vendor will present the top three to four individuals who best fill the position requirements if the State is willing to relocate a candidate. Vendor will present top two to three individuals who best fill the position requirements if the State is not able to relocate a candidate. A comprehensive resume describing past work experiences and education will be presented to the State of Oklahoma on each candidate whom Vendor recommends.

G. **Coordinate Interviews with the State of Oklahoma.** Vendor will work directly with the appropriate State Agency to set up interviews with candidates. Vendor will coordinate schedules between candidates and Agency to arrange for interviews, the amount & type of interview to be determined in step A of this process. Vendor will coordinate any travel arrangements required for non-local candidates. Vendor will participate in and assist with candidate interviews and evaluation.

H. **Coordinate Offer and Acceptance.** Vendor will assist with final negotiations for terms of employment. Vendor will make offer on behalf of State Agency to candidate. When any negotiations are made, Vendor will update Human Resources requesting department on progress as necessary. Vendor will conduct background checks upon verbal acceptance of offer.

II. . State of Oklahoma's Responsibilities in the process include:

A. **Develop an Understanding of the Need.** Ensure that Vendor has sufficient information to share with candidates to enable them to make informed career decisions. Update Vendor on relevant matters regarding the search that the requesting Agency may wish to keep confidential. Ensure Vendor has a complete list of candidates State Agency is aware of that are persons of interest (or conversely, persons not of interest).

B. **Develop Position Specifications.** State will work directly with the Vendor to ensure the position specifications are correct and agreed upon by all parties at the State with hiring influence. State will provide any existing relevant documentation regarding open position including but not limited to, job descriptions.

State will work with Vendor to ensure realistic expectations, goals and requirements are set and match salary availability. All parties must agree before Vendor begins search for candidates.

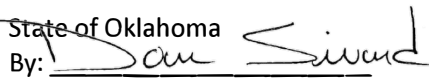
C. **Communicate with Vendor.** State will provide timely feedback to the Vendor about the recommended candidates and relay information as soon as possible following submittals and interviews. Timeline will be provided by Vendor to the State.


State will identify up front, any and all parties that need to be included in this hiring process including but not limited to HR, the hiring manager(s), the Board of Directors, etc. The State will indicate if party is a hiring authority/decision maker or a hiring influencer/non-decision maker. If any parties are introduced after the process has begun, State agrees they will only be hiring influencer/non-decision makers.

The State understands that any delays in the timeline will result in delays in the hiring process. The step by step timeline is below. The State agrees to follow these steps and keep in compliance with this timeline.

- D. **Interviews with the Candidates.** Appropriate State of Oklahoma personnel will conduct interview process as outlined up front and make a final determination and ultimate candidate selection.
- E. **Coordinate Offer and Acceptance.** State will provide offer to Vendor to coordinate acceptance with Selected Candidate. State will provide details of all benefit information to Vendor including medical, dental, vision, life insurance, 401(k), vacation/PTO etc. State will also provide details on relocation package (if applicable). State will provide details on bonus opportunities, performance reviews and any other information pertinent to the candidate's acceptance.
- F. **Submit Payment to Vendor.** State will make two payments to Vendor. The payment will be evenly split. The first payment will be due net 45, upon receipt of invoice. This first invoice will be sent to the State when Candidates are submitted to the State. The second and final payment will be due net 45, upon receipt of invoice. This final invoice will be sent to the State on the candidates first day of employment.

The parties agree that Section B.1 titled Contract Period, is hereby replaced with the following provision:
Contract Period: The initial contract period is from Date of signature through one year. The contract may be renewed for up to two (2) one year option periods.

State of Oklahoma
By: 
Name: Dan Sivard
Title: State Purchasing Director
Date: 2/21/2020

Switchgear Search & Recruiting
By: 
Name: J. L. BOLICK
Title: CEO
Date: 02/12/2020

Milestone Schedule Associated with Time & Cost
Executed Search

Milestone	Maximum Business Days between Milestones	Payment due NET 45 from this date
Vendor engaged by State agency	0	\$0.00
Meeting with State agency, develop understanding of	10	\$0.00
Identify & Qualify Candidates-Screening Interview	15	\$0.00
Qualify Candidates-Top-Grading Interview	15	\$0.00
Candidates submitted to State	10	\$17,500.00
First Interview with the State	10	\$0.00
Qualify Candidates-Reference Interview	5	\$0.00
Second Interview with State (if necessary)	5	\$0.00
Offer and acceptance	5	\$0.00
Candidate begin employment with State	10	\$17,500.00
Total Payment Due to Vendor		\$35,000.00

If there are delays from the State Agency, the Maximum business Days between Milestones will be pushed out the number of days delayed.

Business Days from Award is maximum number of business days from Previous Milestone to Next Milestone

Candidate begin employment with State will depend on how much notice candidate needs to give current employer-average is 10 business days, but could be longer

Payment Due NET 45 from this date is evenly split 1/2 due at each milestone date listed above. This example is for an Executive Search.

Milestone Schedule Associated with Time & Cost
Professional Search

Milestone	Maximum Business Days between Milestones	Payment due NET 45 from this date
Vendor engaged by State agency	0	\$0.00
Meeting with State agency, develop understanding of need and position specifications	10	\$0.00
Identify & Qualify Candidates-Screening Interview	15	\$0.00
Qualify Candidates-Top-Grading Interview	15	\$0.00
Candidates submitted to State	10	\$15,000.00
First Interview with the State	10	\$0.00
Qualify Candidates-Reference Interview	5	\$0.00
Second Interview with State (if necessary)	5	\$0.00
Offer and acceptance	5	\$0.00
Candidate begin employment with State	10	\$15,000.00
Total Payment Due to Vendor		\$30,000.00

If there are delays from the State Agency, the Maximum business Days between Milestones will be pushed out the number of days delayed.

Business Days from Award is maximum number of business days from Previous Milestone to Next Milestone

Candidate begin employment with State will depend on how much notice candidate needs to give current employer-average is 10 business days, but could be

Payment Due NET 45 from this date is evenly split 1/2 due at each milestone date listed above. This example is for a Professional Search.

Milestone Schedule Associated with Time & Cost
Info Technology Search

Milestone	Maximum Business Days between Milestones	Payment due NET 45 from this date
Vendor engaged by State agency	0	\$0.00
Meeting with State agency, develop understanding of need and position specifications	10	\$0.00
Identify & Qualify Candidates-Screening Interview	15	\$0.00
Qualify Candidates-Top-Grading Interview	15	\$0.00
Candidates submitted to State	10	\$10,000.00
First Interview with the State	10	\$0.00
Qualify Candidates-Reference Interview	5	\$0.00
Second Interview with State (if necessary)	5	\$0.00
Offer and acceptance	5	\$0.00
Candidate begin employment with State	10	\$10,000.00
Total Payment Due to Vendor		\$20,000.00

If there are delays from the State Agency, the Maximum business Days between Milestones will be pushed out the number of days delayed.

Business Days from Award is maximum number of business days from Previous Milestone to Next Milestone

Candidate begin employment with State will depend on how much notice candidate needs to given current employer-average is 10 business days, but could be

Payment Due NET 45 from this date is evenly split 1/2 due at each milestone date listed above. This example is for a Info Technology Search.

Milestone Schedule Associated with Time & Cost
Accounting Financial Search

Milestone	Maximum Business Days between Milestones	Payment due NET 45 from this date
Vendor engaged by State agency	0	\$0.00
Meeting with State agency, develop understanding of need and position specifications	10	\$0.00
Identify & Qualify Candidates-Screening Interview	15	\$0.00
Qualify Candidates-Top-Grading Interview	15	\$0.00
Candidates submitted to State	10	\$9,000.00
First Interview with the State	10	\$0.00
Qualify Candidates-Reference Interview	5	\$0.00
Second Interview with State (if necessary)	5	\$0.00
Offer and acceptance	5	\$0.00
Candidate begin employment with State	10	\$90,000.00
Total Payment Due to Vendor		\$18,000.00

If there are delays from the State Agency, the Maximum business Days between Milestones will be pushed out the number of days delayed.

Business Days from Award is maximum number of business days from Previous Milestone to Next Milestone

Candidate begin employment with State will depend on how much notice candidate needs to given current employer-average is 10 business days, but could be

Payment Due NET 45 from this date is evenly split 1/2 due at each milestone date listed above. This example is for an Accounting Financial Search.

Milestone Schedule Associated with Time & Cost
Engineer Architect Search

Milestone	Maximum Business Days between Milestones	Payment due NET 45 from this date
Vendor engaged by State agency	0	\$0.00
Meeting with State agency, develop understanding of need and position specifications	10	\$0.00
Identify & Qualify Candidates-Screening Interview	15	\$0.00
Qualify Candidates-Top-Grading Interview	15	\$0.00
Candidates submitted to State	10	\$12,500.00
First Interview with the State	10	\$0.00
Qualify Candidates-Reference Interview	5	\$0.00
Second Interview with State (if necessary)	5	\$0.00
Offer and acceptance	5	\$0.00
Candidate begin employment with State	10	\$12,500.00
Total Payment Due to Vendor		\$25,000.00

If there are delays from the State Agency, the Maximum business Days between Milestones will be pushed out the number of days delayed.

Business Days from Award is maximum number of business days from Previous Milestone to Next Milestone

Candidate begin employment with State will depend on how much notice candidate needs to given current employer-average is 10 business days, but could be

Payment Due NET 45 from this date is evenly split 1/2 due at each milestone date listed above. This example is for an Accounting Financial Search.

Milestone Schedule Associated with Time & Cost
Human Resource Search

Milestone	Maximum Business Days between Milestones	Payment due NET 45 from this date
Vendor engaged by State agency	0	\$0.00
Meeting with State agency, develop understanding of need and position specifications	10	\$0.00
Identify & Qualify Candidates-Screening Interview	15	\$0.00
Qualify Candidates-Top-Grading Interview	15	\$0.00
Candidates submitted to State	10	\$8,000.00
First Interview with the State	10	\$0.00
Qualify Candidates-Reference Interview	5	\$0.00
Second Interview with State (if necessary)	5	\$0.00
Offer and acceptance	5	\$0.00
Candidate begin employment with State	10	\$8,000.00
Total Payment Due to Vendor		\$16,000.00

If there are delays from the State Agency, the Maximum business Days between Milestones will be pushed out the number of days delayed.

Business Days from Award is maximum number of business days from Previous Milestone to Next Milestone

Candidate begin employment with State will depend on how much notice candidate needs to given current employer-average is 10 business days, but could be

Payment Due NET 45 from this date is evenly split 1/2 due at each milestone date listed above. This example is for a Human Resource Search.

Milestone Schedule Associated with Time & Cost
Marketing Search

Milestone	Maximum Business Days between Milestones	Payment due NET 45 from this date
Vendor engaged by State agency	0	\$0.00
Meeting with State agency, develop understanding of need and position specifications	10	\$0.00
Identify & Qualify Candidates-Screening Interview	15	\$0.00
Qualify Candidates-Top-Grading Interview	15	\$0.00
Candidates submitted to State	10	\$8,000.00
First Interview with the State	10	\$0.00
Qualify Candidates-Reference Interview	5	\$0.00
Second Interview with State (if necessary)	5	\$0.00
Offer and acceptance	5	\$0.00
Candidate begin employment with State	10	\$8,000.00
Total Payment Due to Vendor		\$16,000.00

If there are delays from the State Agency, the Maximum business Days between Milestones will be pushed out the number of days delayed.

Business Days from Award is maximum number of business days from Previous Milestone to Next Milestone

Candidate begin employment with State will depend on how much notice candidate needs to given current employer-average is 10 business days, but could be

Payment Due NET 45 from this date is evenly split 1/2 due at each milestone date listed above. This example is for a Marketing Search.

Milestone Schedule Associated with Time & Cost
Purchasing Buyer Search

Milestone	Maximum Business Days between Milestones	Payment due NET 45 from this date
Vendor engaged by State agency	0	\$0.00
Meeting with State agency, develop understanding of need and position specifications	10	\$0.00
Identify & Qualify Candidates-Screening Interview	15	\$0.00
Qualify Candidates-Top-Grading Interview	15	\$0.00
Candidates submitted to State	10	\$9,375.00
First Interview with the State	10	\$0.00
Qualify Candidates-Reference Interview	5	\$0.00
Second Interview with State (if necessary)	5	\$0.00
Offer and acceptance	5	\$0.00
Candidate begin employment with State	10	\$93,750.00
Total Payment Due to Vendor		\$18,750.00

If there are delays from the State Agency, the Maximum business Days between Milestones will be pushed out the number of days delayed.

Business Days from Award is maximum number of business days from Previous Milestone to Next Milestone

Candidate begin employment with State will depend on how much notice candidate needs to given current employer-average is 10 business days, but could be

Payment Due NET 45 from this date is evenly split 1/2 due at each milestone date listed above. This example is for a Purchasing Buyer Search.



CONTRACT

State of Oklahoma

Dispatch via Print

Supplier 0000395978
SWITCHGEAR SEARCH AND RECRUITING LLC
201 W 5TH ST STE 300
TULSA OK 74103
USA

Contract ID 000000000000000000005739			Page 1 of 1	
Contract Dates 02/25/2020 to 02/21/2021		Currency USD	Rate Type CRRNT	Rate Date PO Date
Description: From Req ID - 0900012935			Contract Maximum 0.00	
TYPE: STATEWIDE				

Tax Exempt? Y Tax Exempt ID:736017987

Contract Lines:

Line #	Cat CD / Item ID / Item Desc	UOM	Minimum Order		Maximum / Open	
			Qty	Amt	Qty	Amt
1	93141802 / Recruitment Services	EA	1.00	0.00	0.00	0.00
Contract Base Pricing			1.00000	EA	0001	

COMMENTS:

Final = The price is final after adjustments
Hard = Apply adjustments regardless of other adjustments
Skip = Skip adjustments if any other adjustments have been applied

Authorized Signature

CONTRACT AWARD DOCUMENT FOR
STATE OF OKLAHOMA CONTRACT WITH GREENWOOD/ASHER
RESULTING FROM SOLICITATION NO. #0900000380

This Contract Award Document (:Contract Award”) is the document awarding the Contract to Greenwood/Asher & Associates, Inc. by State of Oklahoma (“State”) in connection with Solicitation 0900000380 subject to the following terms set out below and is effective upon the date of the last signature below.

Recitals

Whereas, the State issued a Solicitation for proposal to provide Executive Search Services as more particularly described in the Solicitation;

Whereas, the State and Greenwood/Asher have negotiated the final terms and conditions under which Greenwood/Asher will provide the related services under the Contract.

Now, therefore, in consideration of the foregoing and the mutual promises set forth herein, the receipt and sufficiency of which are hereby acknowledged the parties agree as follows:

Contract Award Purpose. This Contract Award memorializes the agreement of the parties with respect to negotiated terms of the Contract that is being awarded to Greenwood/Asher as of even date with executive of this Contract Award. The parties agree that Greenwood/Asher has not yet begun performance of work contemplated by the Solicitation. The parties agree that any and all exceptions to the Solicitation in Greenwood/Asher’s response that are not memorialized in this Contract Award are not accepted by State and will not become part of the Contract. All exception to the Solicitation included in Greenwood/Asher’s response and Statement of Work are superseded and replaced in entirety by this Contract Award.

SCOPE OF SERVICES/DETAILED SCOPE DESCRIPTION

The scope of your services or a detailed scope description.

Our approach will be customized to meet the specific needs of the state of Oklahoma. We are a nimble firm and can be responsive to client needs at all times. In general, for our approach, G/A&A will:

- Meet with the client to gather information and intelligence to customize executive search services. The G/A&A project manager, which will be one of the partners or senior executive search consultants, will meet with relevant constituent groups in the first phase of any search. Clients have found these meetings particularly helpful as they establish a rapport, enhance the communication between stakeholders, and provide the community with a clear understanding of the State's mandates.
- Collaborate with the client to develop an overall search plan of action, timeline, recruitment materials, and design an interview and selection process, which will present the strengths, challenges, and opportunities of each applicant to secure the candidates who best match your criteria.
- Comment on, draft, or collaborate with the client regarding creation or updates to the position profile for any executive level positions.
- If needed, assist in determining how to advertise the position and with the placement of advertisements in international, national, and local papers and publications such as *The Chronicle of Higher Education*, *DIVERSE* (formerly *Black Issues in Higher Education*), *Hispanic Outlook in Higher Education*, *Women in Higher Education*, *The Chronicle of Philanthropy*, media outlets specific to the field.
- Actively recruit individuals who have a high probability of success in meeting the requirements specified in the position profiles for the executive level positions. Recruit a diverse prospect pool for consideration, which will include using our databases and contacting reliable sources and organizations for recommendations.
- Screen applicants and nominees, and provide supporting documentation of recruitment efforts, including overall market feedback and gender/diversity statistics. Track and manage prospect and candidate information throughout the search process and provide detailed background information on the candidates.
- Compare candidates within a customized matrix (via resume, additional information, and preliminary interviews) with stated characteristics and qualities listed in the position profiles.
- Conduct or assist the client in conducting background checks and coordinate reference checks on selected candidates.
- Provide technical, administrative, and logistical support for the search and interview process, site visits, final selection, contract negotiations, transition considerations, and follow-up. Drs. Greenwood and Asher will be available for timely consultation with the client regarding the search, work of the search firm, and the candidates.
- Utilize a specialized client feedback tool that measures client satisfaction. As part of this process, the client evaluates our work in all areas of the search on a four-point scale where 1 is the lowest and 4 is the highest. Our average rating is 3.90.
- Many conferences and meetings can be conducted via video conferencing. We used this successfully with other searches. We also can place information, including candidate files, on a password-protected website, which allows committee members to access them easily and quickly. Further, many of our clients are using electronic forms of communication as a vehicle for round one of interviews. The use of video conferencing

can be significant cost savings to our clients, and we have demonstrated success with this audio and video capability.

Program Plan

- We understand the importance of having the right person to fill positions. Our consultants have a history of 97% repeat business, searches that close with the client getting the candidate of first choice, and a process that allows the search committee (or other representative group) to reach an agreement. Many of our client relationships are long-term.
- The G/A&A project manager will collaborate with the client throughout the search, from the initial meeting through the recruitment, evaluation, and selection of the successful candidate. We understand the unique challenges of search and are prepared to leverage our expertise throughout the process to meet the agreed-upon objectives. Based on our experience with international and national searches, we have developed a vast network of sources and contacts that will provide nominations.
- G/A&A will provide master lists of candidates, weekly search updates, market feedback reports, reference reports, and other presentations as needed.
- The G/A&A project manager will attend and direct any search at regularly scheduled meetings. The project manager will coordinate with the client on communication strategies and will be able to provide advice on cost-effective ways to conduct a high-quality search.

MILESTONE SCHEDULE

To present your milestone schedule which is associated with time and cost

On average, we complete searches within three to six months. The length of a search depends upon when the client wants to start a search and desires to make an offer to make a hire. Academic calendars and holiday periods have an impact on the flow of a search schedule, as well as the language of faculty contracts regarding when faculty can participate in committees. We can also conduct expedited searches with the cooperation of the decision-maker and in consideration of the institution's calendar.

As a retained executive search firm, we facilitate the entire search process from launch through hiring. Because of this full-serve philosophy, we do not calculate a cost breakdown for each component of a search. Our professional fee includes the facilitation of all steps of the search.

Milestones, Activities, and Deliverables

We will prepare deliverables in compliance with requests by the state of Oklahoma. The following chart represents potential examples.

Milestones	Related Activities	Deliverables
Initiation of search(es) and the establishment of expectations	Initial meetings with the client	Agreement on position profiles, process, format, work plans, schedules, and budget for the searches
Organizational needs analysis	Forums conducted with stakeholders, when needed	Agreement on institutional needs
Research and candidate development	Research and targeted outreach to candidates	Establishment of pools of viable candidates

Milestones	Related Activities	Deliverables
Candidate evaluation: Determination of candidates to interview	Hold meetings to review prospects (long list)	Resumes and updates on other information gathered on candidates Market feedback report delivered
Candidates selected for the first round of interviews	Logistics surrounding interviews and schedules (i.e., airport interviews can be conducted for 8-12 candidates)	Advance agreement on a list of interview questions and interview process
Semi-finalists candidates selected: Review of background information on the candidates	Coordination of reference checks as requested by the client, including 360 reference feedback Coordination of background checks as requested by client	Client selects final candidates
Candidate selection: Final round of interviews	Logistics surrounding interview schedule Discussion of communication strategies Intervention regarding any candidate issues	Agreement on pools of acceptable finalists
Negotiation and completion of searches	Contract negotiations	Final candidate selected

Timeline

Brief overview of the timetable (subject to availability of candidates and client):

* The timeline **can be modified** to meet the needs of the client.

Month 1	Search initiation and establishment of expectations
Month 2	↓ Research, candidate development, and candidate evaluation
Month 3	↓ Candidate selection, negotiation and search completion

Phase I (Search initiation and establishment of expectations)

- Establish partnership and clarify expectations
- Conduct orientation to the search process
- Discuss the application of best practices and search experience
- Establish a schedule for the search
- Review client materials
- Discuss how the client wants the process to evolve, including the involvement of other departments, such as Human Resources
- Gain consensus on the characteristics and skills desired in the candidate (e.g., based on the culture of the organization)
- Work with the client to design an evaluation checklist (required vs. desired characteristics)
- Meet with constituencies, as needed
- Revise profile with input from appropriate constituencies
- Clarify administrative tasks for the search (e.g., roles and responsibilities for each step of the process)
- Assist with the web site, as needed

- Design a communication plan, including a strategy for appropriately informing constituencies of the search process
- Develop advertisement(s) and determine placement
- Exchange information relevant to the search (e.g., important phone numbers)

Phase II (Research and candidate development)

- Develop strategies for the search to encompass a diverse pool of candidates
- Complete original research
- Contact sources and prospects
- Send information to prospects
- Develop communication systems to sources, prospects, and candidates (e.g., thank you letters)

Phase III (Candidate evaluation)

- Pre-qualify candidates
- Obtain resumes and additional materials
- Assess candidates' skills and experience against the profile

Phase IV (Candidate selection)

- Present market feedback report
- Prepare a master list of active candidates
- Present and discuss candidates with the client
- Committee determines the client's top candidates to be invited to interview
- Sign off candidates not going forward
- Schedule interviews
- Prepare for and conduct interviews
- Committee determines semi-finalists from the first round of interviews
- Complete preliminary background checks
- Provide feedback on background checks
- Committee selects finalists
- Optional: Finalists take our behavioral assessment

Phase V (Negotiation and search completion)

- Review candidate compensation and other considerations with the client
- Conduct a final round of interviews
- Gain consensus on the final candidate and the offer to be made
- Assist in negotiating the final contract
- Confirm candidate acceptance
- Complete additional communications

RISK MANAGEMENT PLAN

Your risk management plan (RMP). This includes risks and the potential mitigation to the risks

There are inherent risks to the timely and successful completion of any search project. We have completed hundreds of searches so that our branded processes are time-tested across many types of institutions and position-types. We find that the most significant risks that could face any search have to do with four categories of issues:

- Any unexpected issues that arise for the institution that besmirches its reputation in the marketplace is a critical risk for any search. This is especially true for any issue that arises during the search timeline. G/A&A works with the client to understand any reputational issues that may exist and are already known in the marketplace as the search commences so that we can develop explanations for that situation in our recruitment conversations. For incidents that may arise during the search timeline, we would work with the hiring authority to develop language appropriate for sharing with existing candidates that explains the situation in relation to the position and the work that a hire into the position would have to do regarding the incident going forward.
- Discoveries about the viability of the salary that the client anticipates offering in the marketplace for the position constitute a second risk for any search. As we speak with prospects and sources, we constantly ask questions about the typical salary and benefits packages for similar positions. We report a summary of this information to the hiring authority. If the client is offering a compensation package that is below the expectation of the market, it may be difficult for the client to secure candidates of the desired quality. We work with the hiring authority to address issues of compensation package viability so that the institution can hire the quality of candidates discovered in the search.
- Breaches of confidentiality constitute the third risk. People enter a search with the expectation that their candidacy and their materials will remain confidential until the final, and typically public, campus visit phase of the process. If information is leaked, candidates typically withdraw from the process. This can mean the loss of highly qualified candidates from consideration, which weakens the candidate pool and undermines the validity of the search process itself. Confidentiality breaches typically come from committee members or staff members who have a role with regard to the search. We provide training to committee members about the importance of and processes of confidentiality, request that committee members sign a pledge of confidentiality, and remind members about confidentiality at each phase of the search. However, we cannot monitor search committee members and staff during every day of their involvement in the search.
- Misalignment of position requirements with expectations of stakeholders constitutes the fourth risk. Often before a search firm is hired, the institution, via the hiring authority, search committee, and human resources office, establishes the responsibilities of the position and required/desired characteristics for the new hire for presentation in a position profile. We favor the opportunity for G/A&A, along with search committee members, to conduct campus forums with constituency groups to gather information on responsibilities and characteristics as a first stage in launching a search. Input from such forums can significantly inform the development of the position profile. Such forums also create the opportunity for buy-in by these constituencies into the hiring process. It is the institution's choice as to whether such forums will be conducted. If the expertise and experiences of the person hired or even if the finalists presented to the campus are misaligned, in the minds of stakeholders, with the needs of the position, there can be a lack of support for the search and hire. This may lead to an inability of the new hire to thrive in the position. We work with hiring authorities and search committees to address these issues, including offering add-on support for the transition and start-up phase of the new hire's employment towards the goal of facilitating success for the new hire and the institution.

We are proactive in addressing this and all types of risks that may emerge in the process of a search to ensure the successful completion of the searches that we facilitate.

STATE'S RESPONSIBILITIES

Identify the States responsibilities

At Greenwood/Asher & Associates, we understand that each client is unique and different in its expectations. We desire to meet the needs of each client and work with the client most effectively and efficiently to achieve the best outcome. We are organized to do as much or as little of the search activity as desired by the client.

The listing below details the typical distribution roles and responsibilities. Our approach is collaborative, and we discuss expectations at the outset of the search.

- The state of Oklahoma is responsible for selecting a review committee that will screen candidates and make internal arrangements for all meetings.
- It is expected that each search committee member will review candidate files and, where possible, attend all meetings. The number of files will be defined when we decide upon whether or not the committee wishes Greenwood/Asher & Associates to do pre-screening of any applications.
- Together with the state of Oklahoma, G/A& A will develop a calendar that includes the following meetings: 1) an orientation/startup meeting, 2) a prospect review meeting, 3) round one and round two of interviews and 4) a finalist selection meeting. G/A&A will prepare drafts for consideration.
- Greenwood/Asher & Associates will develop an advertisement for the position and position description. The hiring authority and search committee will approve both of these documents.
- The state of Oklahoma will determine what level of advertising is needed and, if needed, select appropriate advertising vehicles. These may include local vehicles (newspapers) and national vehicles appropriate for the position. G/A&A will generally place this advertisement (unless there are State policies or interests in doing this internally).
- G/A&A will do all the research, seek and contact nominees, appropriate candidates from the market, and advertisement responses.
- The search committee is expected to interview two rounds of candidates and, together with the hiring authority, select the finalist(s). Greenwood/Asher & Associates performs all administrative functions such as coordinating schedules and travel, and preparation of interview books. Dr. Greenwood or Dr. Asher will be present and facilitate the off-site (round one) interviews.
- G/A&A will develop a draft list of interview questions to be reviewed and approved by the search committee. These questions are used in the preliminary screening.
- Greenwood/Asher & Associates will provide on-going lists of active candidates and nominees and their status.
- The state of Oklahoma will provide information packets for prospects and those on the list to be interviewed at Round One. Generally, the public relations department will forward those to Greenwood/Asher & Associates and we forward to prospects as we need them.
- Greenwood/Asher & Associates will conduct background work. Typically, committee members want to participate in reference checking.
- Greenwood/Asher & Associates will be available at each meeting.

Executive Search Pricing for a Range of Salaries at the State of Oklahoma*				
Salary Range				Total G/A&A Pricing Package
Up to \$180,000				\$ 67,200
\$181,000 to \$249,000				\$ 84,000
\$250,000 to \$349,000				\$100,800
\$350,000 to \$499,000				\$134,400
\$500,000 and over				\$168,000

Overview: All the searches are tailor-made to the needs of the client. We can assist the client in designing a budget for the entire search. The expense budget will not exceed without prior client approval. Expenditures are based on client requests. The cost of the search will be the fee plus expenses with receipts based on work requirements as directed by the client.

Value Added Services Costs:

Client Expenses: Additional expenses are not included in G/A&A fees and indirect expenses. These can be invoiced through G/A&A, but are client expenses that are directed by client requests and include the following:

- **Candidates:** Most clients budget \$500-\$1,000 per person per trip. The client will have to decide how many candidates it wishes to see (e.g., five vs. ten) and should budget accordingly. The travel expenses are actual (with evidence of receipt). Some of our clients have a policy that caps daily hotel and food expenses and requires coach airfare. We can provide this type of detailed response and accounting if you prefer.
- **Advertisements:** These are not a requirement of the firm but are placed based on the client's request.
- **Background Checks:** Some clients prefer to do part of the background checks themselves so that this cost will vary based on the requirements of the client. We often are asked to coordinate these services for our clients. The services may include degree verification, litigation search, driving record search, criminal, and credit reports. In general, the cost for the background work (beyond the reference report that is included in the fee) is typically about \$1,000 to \$7,000 per candidate dependent on the research by the client. The number of candidates for which this verification is done will vary based on the needs of clients. Some clients ask that credentials be verified on a single finalist, while others prefer having it done on all those invited for final interviews. We encourage our clients to hire a private investigator or conduct additional background work that may be unique to their situation. We recommend and coordinate the services of Mintz Group for in-depth reviews. Our background work meets or exceeds the higher education search industry standard; however, we are not a private investigation firm. We can make recommendations for additional services if our clients believe they are needed.
- **Research:** As a part of due diligence, we conduct a review of newspapers for which there is a subscription fee estimated at \$200 per search.

Client Savings as a Result of Using G/A&A Comprehensive Services: G/A&A knows that your staff members are very busy and without available free time to provide staff services for searches. Clients have told us it is not unusual to have a full-time person on campus to provide services to the searches if the search firm does not provide what is needed. They also have told us this can cost them between \$40,000+ for an administrative assistant and \$150,000+ for an attorney a year. As part of your G/A&A fee, we can provide all services except those listed below for you, therefore saving you money.

- We do not have contract authority on your behalf, which means if you decide to do off-site interviews, we cannot sign the contracts on your behalf with hotels or location the client chooses. We can work with the hotels to arrange all the details, but you must sign the contract.
- We cannot assign rooms for on-site interviews. Those on-site arrangements are completed by your campus office that has the responsibility to assign space.
- Of course, we cannot sign the contract with the person you hire. We can negotiate the details of the contract when requested.

Guarantee: G/A&A agrees to make every possible effort to present you with the best candidates. However, we cannot guarantee the performance of a candidate ultimately selected by you. G/A&A agrees that if a person is hired for the position and within one year of employment is terminated for cause by the client for reasons that should have been identified by G/A&A during the search assignment, we will conduct a replacement search

The parties agree that Section B.1 titled Contract Period, is hereby replaced with the following provision:
Contract Period: The initial contract period is from Date of signature through one year. The contract may be renewed for up to two (2) one year option periods.

State of Oklahoma

By: 

Name: Dan Sivard

Title: State Purchasing

Director Date: 2/21/2020

Greenwood/Asher & Associates, Inc.

By: 

Name: Jan Greenwood

Title: President & Partner

Date: 2/20/2020

Milestones, Activities, and Deliverables
Salary Range - Up to \$180,000

Milestones	Related Activities	Deliverables	Fee
1 Initiation of search(es) and the establishment of expectations	Initial Meetings with the Client Forums conducted with stakeholder, when needed	Agreement on position profiles, process, format, work plans, schedules, and budget for the search	
2 Organizational needs analysis		Agreement on institutional needs	\$16,800.00
3 Research and candidate development Candidate evaluation: Determination of	Research and targeted outreach to candidates	Establishment of pools of viable candidates Resumes and updates on other information	
4 candidates to interview	Hold meetings to review propoects (long list)	gathered on candidates. Market feedback report	\$16,800.00
5 Candidates selected for the first round of interviews	Logistics surrounding interviews and schedules (i.e., airport interviews can be conducted for 8-12 candidates) Coordination of reference checks as requested by the client, including 360 reference feedback.	Advance agreement on a list of interview questions and interview process	
6 Semi-finalists candidates selected: Review of background information on the candidates	Coordination of background checks as requested by client.	Client selects final candidates	\$16,800.00
7 Candidate selection: Final round of interviews	Logistics surrounding interview schedule. Discussion of communication strategies.		
8 Negotiation and completion of searches	Intervention regarding any candidate issues Contract negotiations	Agreement on pools of acceptable finanlists Final Candidate selected	\$16,800.00
Executive Search Pricing			\$67,200.00

Client driven expenses are not included in the G/A&A's total package pricing. These expenditures are based on clident request. Accompanied by receipts, and include items like consultant travel, lodging and food; candidate travel, lodging and food; placement of advertisements, and background checks (e.g. criminal, degree verification, etc.). Supplier can assist the client in designing a budget for the entire search.

Payment Due NET 45 from the date of invoices and is evenly split 25% due at each milestone listed above.

Milestones, Activities, and Deliverables
Salary Range - \$181,000 to \$249,000

Milestones	Related Activities	Deliverables	Fee
1 Initiation of search(es) and the establishment of expectations	Initial Meetings with the Client Forums conducted with stakeholder, when needed	Agreement on position profiles, process, format, work plans, schedules, and budget for the search	
2 Organizational needs analysis		Agreement on institutional needs	\$21,000.00
3 Research and candidate development	Research and targeted outreach to candidates	Establishment of pools of viable candidates Resumes and updates on other information gathered on candidates. Market feedback report delivered	
4 Candidate evaluation: Determination of candidates to interview	Hold meetings to review propoects (long list)		\$21,000.00
5 Candidates selected for the first round of interviews	Logistics surrounding interviews and schedules (i.e., airport interviews can be conducted for 8-12 candidates) Coordination of reference checks as requested by the client, including 360 reference feedback.	Advance agreement on a list of interview questions and interview process	
6 Semi-finalists candidates selected: Review of background information on the candidates	Coordination of background checks as requested by client.	Client selects final candidates	\$21,000.00
7 Candidate selection: Final round of interviews	Logistics surrounding interview schedule. Discussion of communication strategies. Intervention regarding any candidate issues	Agreement on pools of acceptable finanlists	
8 Negotiation and completion of searches	Contract negotiations	Final Candidate selected	\$21,000.00
Executive Search Pricing			\$84,000.00

Client driven expenses are not included in the G/A&A's total package pricing. These expenditures are based on clident request. Accompanied by receipts, and include items like consultant travel, lodging and food; candidate travel, lodging and food; placement of advertisements, and

Payment Due NET 45 from the date of invoices and is evenly split 25% due at each milestone listed above.

Miestones, Activities, and Deliverables
Salary Range - \$250,000 to \$349,000

Milestones	Related Activities	Deliverables	Fee
1 Initiation of search(es) and the establishment of expectations	Initial Meetings with the Client Forums conducted with stakeholder, when needed	Agreement on position profiles, process, format, work plans, schedules, and budget for the search	
2 Organizational needs analysis		Agreement on institutional needs	\$25,200.00
3 Research and candidate development	Research and targeted outreach to candidates	Establishment of pools of viable candidates Resumes and updates on other information gathered on candidates. Market feedback report delivered	
4 Candidate evaluation: Determination of candidates to interview	Hold meetings to review propoects (long list)		\$25,200.00
5 Candidates selected for the first round of interviews	Logistics surrounding interviews and schedules (i.e., airport interviews can be conducted for 8-12 candidates) Coordination of reference checks as requested by the client, including 360 reference feedback.	Advance agreement on a list of interview questions and interview process	
6 Semi-finalists candidates selected: Review of background information on the candidates	Coordination of background checks as requested by client.	Client selects final candidates	\$25,200.00
7 Candidate selection: Final round of interviews	Logistics surrounding interview schedule. Discussion of communication strategies. Intervention regarding any candidate issues	Agreement on pools of acceptable finanlists	
8 Negotiation and completion of searches	Contract negotiations	Final Candidate selected	\$25,000.00
Executive Search Pricing			\$100,800.00

Client driven expenses are not included in the G/A&A's total package pricing. These expenidtures are based on clident request. Accompanied by

Payment Due NET 45 from the date of invoices and is evenly split 25% due at each milestone listed above.

Milestones, Activities, and Deliverables
Salary Range - \$350,000 to \$499,000

Milestones	Related Activities	Deliverables	Fee
1 Initiation of search(es) and the establishment of expectations	Initial Meetings with the Client Forums conducted with stakeholder, when needed	Agreement on position profiles, process, format, work plans, schedules, and budget for the search	
2 Organizational needs analysis		Agreement on institutional needs	\$33,600.00
3 Research and candidate development	Research and targeted outreach to candidates	Establishment of pools of viable candidates Resumes and updates on other information gathered on candidates. Market feedback report delivered	
4 Candidate evaluation: Determination of candidates to interview	Hold meetings to review propoects (long list)		\$33,600.00
5 Candidates selected for the first round of interviews	Logistics surrounding interviews and schedules (i.e., airport interviews can be conducted for 8-12 candidates) Coordination of reference checks as requested by the client, including 360 reference feedback.	Advance agreement on a list of interview questions and interview process	
6 Semi-finalists candidates selected: Review of background information on the candidates	Coordination of background checks as requested by client.	Client selects final candidates	\$33,600.00
7 Candidate selection: Final round of interviews	Logistics surrounding interview schedule. Discussion of communication strategies. Intervention regarding any candidate issues	Agreement on pools of acceptable finanlists	
8 Negotiation and completion of searches	Contract negotiations	Final Candidate selected	\$33,600.00
Executive Search Pricing			\$134,400.00

Client driven expenses are not included in the G/A&A's total package pricing. These expenidtures are based on clident request. Accompanied by

Payment Due NET 45 from the date of invoices and is evenly split 25% due at each milestone listed above.

Miестones, Activities, and Deliverables
Salary Range - \$500,000 and over

Milestones	Related Activities	Deliverables	Fee
1 Initiation of search(es) and the establishment of expectations	Initial Meetings with the Client Forums conducted with stakeholder, when needed	Agreement on position profiles, process, format, work plans, schedules, and budget for the search	
2 Organizational needs analysis		Agreement on institutional needs	\$42,000.00
3 Research and candidate development	Research and targeted outreach to candidates	Establishment of pools of viable candidates Resumes and updates on other information gathered on candidates. Market feedback report delivered	
4 Candidate evaluation: Determination of candidates to interview	Hold meetings to review propoects (long list)		\$42,000.00
5 Candidates selected for the first round of interviews	Logistics surrounding interviews and schedules (i.e., airport interviews can be conducted for 8-12 candidates) Coordination of reference checks as requested by the client, including 360 reference feedback.	Advance agreement on a list of interview questions and interview process	
6 Semi-finalists candidates selected: Review of background information on the candidates	Coordination of background checks as requested by client.	Client selects final candidates	\$42,000.00
7 Candidate selection: Final round of interviews	Logistics surrounding interview schedule. Discussion of communication strategies. Intervention regarding any candidate issues	Agreement on pools of acceptable finanlists	
8 Negotiation and completion of searches	Contract negotiations	Final Candidate selected	\$42,000.00
Executive Search Pricing			\$168,000.00

Client driven expenses are not included in the G/A&A's total package pricing. These expenidtures are based on clident request. Accompanied by

Payment Due NET 45 from the date of invoices and is evenly split 25% due at each milestone listed above.



CONTRACT

State of Oklahoma

Dispatch via Print

Supplier 0000486664
GREENWOOD ASHER & ASSOCIATES
42 BUSINESS CENTRE DR UNIT 206
MIRAMAR BEACH FL 32550-6995
USA

Contract ID 000000000000000000005740			Page 1 of 1	
Contract Dates 02/25/2020 to 02/21/2021		Currency USD	Rate Type CRRNT	Rate Date PO Date
Description: From Req ID - 0900012935			Contract Maximum 0.00	
TYPE: STATEWIDE				

Tax Exempt? Y Tax Exempt ID:736017987

Contract Lines:

Line #	Cat CD / Item ID / Item Desc	UOM	Minimum Order		Maximum / Open	
			Qty	Amt	Qty	Amt
1	93141802 / Recruitment Services	EA	1.00	0.00	0.00	0.00
Contract Base Pricing			1.00000	EA	0001	

COMMENTS:

Final = The price is final after adjustments
Hard = Apply adjustments regardless of other adjustments
Skip = Skip adjustments if any other adjustments have been applied

Authorized Signature