

***OUR FIRM AND HOW WE WORK***

**AN INTRODUCTION TO**

**ROBERT SELLERY ASSOCIATES, LTD.**

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## **STATEMENT OF PURPOSE**

Robert Sellery Associates, Ltd. (RSA) delivers high-quality, individually tailored, executive search services to the global not-for-profit community.

RSA principals engage in a collaborative, problem-solving process to identify, assess, recruit, perform reference and background checks, and negotiate with candidates for mid- and senior-level positions. We also counsel clients on the organizational and marketplace factors that make for attracting candidates.

RSA principals value the highest levels of professional conduct and adhere to high standards of ethics, confidentiality, and responsiveness with everyone they serve throughout the search process.

## **RSA EXECUTIVE SEARCH SERVICES—HIGHLIGHTS**

**OUR CLIENTELE** is small, medium, and large nonprofit organizations that serve a broad range of interests. For example,

- Education: large public and private universities, and small private colleges
- Health Care: national health groups and community hospitals
- Arts and Culture
- Religion
- Human Services
- Conservation and the Environment
- Public Affairs
- Think Tanks
- Foundations
- Associations
- Government

We seek senior-level and mid-level administrators for a wide range of line and staff positions. We have found executive directors, CEOs, and presidents; CFOs, treasurers, and chief investment officers; COOs and general managers, and chief development, academic, communication, and program officers, along with staff that report to these positions.

The compensation range for our placements in the not-for-profit sector has extended from \$75,000 to over \$250,000 for top administrators.

Our practice is nationwide and international in scope. Clients and candidate prospects come from around the country and outside the boundaries of the United States.

- See Appendix D for a *Representative List of Completed Assignments*

**OUR FIRM** has over 30 years experience in executive search. Robert (Bob) A. Sellery, *Managing Director*, and Kathryn (Katie) B. Wilson, *Vice President*, lead our mid-sized executive search consultancy. Prior to becoming executive search consultants, our principals had experience in management consulting at Booz Allen & Hamilton (the “inventors” of executive search); academic administration, including library service; fundraising; public relations, and leadership assessment.

Located in Washington, D.C., RSA has broad access to national trade associations, professional membership organizations, and all branches of Congress and the federal government.

- See *Appendix C* for Biographical Sketches of Bob Sellery and Katie Wilson.

**OUR APPROACH** is for principals to be involved in every facet of the search, from client orientation and position specification development, to designing a search that is tailored to each client's needs, to recruiting, assessing, and negotiating with candidates. We develop collaborative and close working relationships with our clients and stay with them every step of the way until the search is complete.

### **Search Timetable**

While every search has its own, unique character and timetable, a typical search will take three to four months from the time of engagement to candidate selection. The schedule often depends upon the personal calendars of the candidates and the people involved in the selection process. Our experience shows that this optimum time frame allows for thorough research, analysis, and selection without compromising any phase of the search.

RSA is committed to presenting a preliminary list of candidates within four to six weeks of engagement. This list of candidates will provide an early reading of two important factors: whether the position specification is generating interest, and marketplace perception of the organization.

- See Appendix A for a full *Typical Search Timetable*.

## PRODUCT OFFERINGS

Our practice is exclusively devoted to executive search consulting, with a choice of product offerings. Our products include **full search** and **custom search** services, both involving leadership assessment.

### Full Search

A full search is conducted in several phases, and our experience indicates that the success of the search often depends upon careful planning and orientation in the first phases. A brief description of the phases of a RSA search follows.

**Orientation:** RSA meets one-on-one with key stakeholders in the organization and the position to get a full description of expectations for the candidate and gauge the “chemistry” of the organization and its employees.

**Position Specification:** After the orientation interviews, we produce a position specification, which includes a job description, qualifications for candidates, and the *attractions* and *critical issues* that are unique to the situation, which the candidate must know.

**Tailored Search Strategy:** Next we develop a search strategy tailored to the client organization’s needs. The strategy will include identifying *target organizations*, which may complement the client organization, or those groups that the client specifically requests for sources of candidate prospects. The strategy also includes research in the *RSA database* of candidates and sources, which includes scores of contacts we have met face-to-face from over 30 years in the business.

**Candidate Selection:** We begin the process of contacting candidates to determine their interest in exploring the situation. Within four to six weeks we will produce a *summary report* of candidates from our initial efforts and schedule a meeting with the client to review progress to date. Adjustments to the search strategy may be made at this time if needed.

**Candidate Interviews:** While the candidate identification process continues, we will also meet with any candidates selected by the client from our first progress report for an in-depth appraisal. During the interviews, RSA conducts a thorough *management and leadership assessment*. In this assessment process, RSA adds value in the typical executive search offering. Confidential reports are written on each candidate identifying his or her strengths and limitations, and a recommendation is made for or against further action.

**Client Meetings:** The client meets with top candidates for appraisal and selection, with the RSA assessment report in hand.

**Final Phase:** RSA will conduct reference and background checks as requested by the client and assist in any employment negotiations.

### **Custom Search**

Some clients are facing special situations that require a partial search or a customized approach. For example, a client might ask for help in evaluating candidates that they have found on their own. RSA has a well-developed process for a partial search request. We augment our standard interview format with questions assessing the candidate's leadership skills followed by a detailed written report on not only the candidate's strengths and limitations but also on development areas.

Other search services that we offer in a custom search include reference checking, background checks, job description development, salary surveys, interview formats, and organizational readiness assessments.

RSA is pleased to discuss your specific needs and offer a proposal for a custom search.

- See *Arrangements for Services* section for cost guidelines.

## ARRANGEMENTS FOR SERVICES

Essential features of our **Full Search** service fees:

- Fee is one-third of the first year's total estimated cash compensation, including bonus or other compensation, received by anyone engaged with our assistance, plus reimbursement of expenses.
- Fee is for retainer search work and not contingent upon anyone being hired.
- Bill for expenses directly related to the assignment, such as research, travel, communications, and support services.
- Fees and expenses are billed in three monthly installments while the search is in progress. The first statement is rendered when the search is authorized.
- Search may be canceled at any time, with pro-rata fees payable up to that date.
- Assignments are exclusive.

When a search is authorized, we will send an **Agreement Letter** outlining these arrangements in detail.

Please ask for an estimate for **Custom Search** services.

## MANAGEMENT AND LEADERSHIP ASSESSMENT

A key part of matching the right candidate to a mid- or senior-level position involves assessing the candidate's management and leadership abilities. Understanding the client's organizational culture—where it falls in the range from hierarchical to participative—is a crucial factor in matching the person to the place.

We have developed an understanding of the nature of leadership drawn from Bob Sellery's independent research at Princeton University's Woodrow Wilson School, and Katie Wilson's work with a publisher of management and leadership assessment surveys. We apply this background when interviewing candidates. For example, we hold that:

- The best leaders are highly capable in anticipation, resource coordination, and planning for future needs.
- A time of change will require the capacity for imagination, intuition, and creativity in leaders, and the ability to combine old ideas and experience with new ways of doing things.
- Leadership is concerned with the critical decisions for the organization and the choices that affect the basic character of the institution
- The most important aspect of the leadership process is the speed and direction of its forward motion and the nature of its side effects.

### Management and leadership factors

RSA has incorporated in its assessment of candidates the use of factors from the psychological literature, and best practices in the management and leadership training fields. There is a strong indication that specific characteristics correlate highly with successful management and leadership strategies. We look for these characteristics during the interview and afterwards write a **Confidential Comments** report outlining the candidate's strengths and limitations, including our assessment of his or her management and leadership experience and potential.

For example, we will assess a candidate's strength in the following areas:

- Setting goals
- Vision
- Imagination
- Taking risks

- Teambuilding
- Solving problems
- Influencing others
- Persistence
- Energy
- Drive
- Appreciating others
- Calm
- Integrity
- Intelligence
- Stability

Our clients report that this leadership assessment service adds great value to the search process and is enormously helpful for not only hiring the right person but also planning for orientation and development once a candidate is chosen.

## SERVICE PROMISE

*With every assignment we undertake, we promise our best efforts and abilities to solve our client's problem successfully, whatever that may require in time and effort.*

Further, we promise the following values and results.

1.

We are committed to **measurable results** and to presenting preliminary candidate profiles *within 4 to 6 weeks* of engagement. This early reading of interest in the position allows our clients to have a quick response to such questions as:

Can the position be filled under existing specifications?

From where are candidates coming?

How does the marketplace perceive our organization?

2.

Each RSA principal is responsible for both managing and conducting his or her searches. This **no division of labor** approach ensures that our clients are served only by experienced professionals, whom they have met, for all facets of the search process.

3.

We will continue to work actively toward a **satisfactory completion** of each search assignment. Beyond a commitment to honesty, confidentiality, and efficiency in a search, we subscribe to intangible values of enthusiasm for the assignment, as well as a team relationship geared toward success, client satisfaction, and a continuing working relationship.

4.

After the search is completed, we will maintain open lines of communication with the successful candidate and the hiring manager and ensure **candidate and client follow-up**.

## APPENDIX

- A. Typical Search Timetable
- B. Members of the Firm
- C. Background Sketches
- D. Representative List of Completed Assignments
- E. Electronic Capabilities

## A: TYPICAL SEARCH TIMETABLE

<b>TASK</b>	<b>ACTION</b>	<b>ESTIMATED TIME TO COMPLETE</b>	<b>ESTIMATED CUMULATIVE ELAPSED TIME</b>
<b>ORIENTATION</b>	<p>Meet with people involved in selection process and others as needed.</p> <p>Produce position specification, describing the situation, attractions, critical issues, responsibilities of the position, and professional and personal qualities.</p>	1 – 2 days	1 – 2 days
<b>ADVERTISEMENT (if needed)</b>	<p>Produce draft and final copy and art work for advertisements.</p> <p>Design system to acknowledge receipt of candidates responding to advertisements.</p>	1 – 2 days	4 days
<b>SEARCH</b>	<p>Develop list of “target organizations” where candidates are likely to be working now.</p> <p>Review RSA’s contacts who can lead us to appropriate candidates.</p>	7 days	11 days
<b>CONTACT SOURCES</b>	<p>Begin to telephone people who can lead us to qualified and interested candidates.</p>	15 days	26 days
<b>CONTACT PROSPECTIVE CANDIDATES</b>	<p>Begin to telephone prospective candidates to determine their interest in exploring this situation.</p> <p>Include internal candidates, if applicable.</p>	15 days	41 days

<b>EVALUATE AND SUMMARIZE RESPONSES TO ADVERTISEMENT</b>	Produce summary report.	4 days	45 days
<b>FIRST PROGRESS MEETING</b>	Review progress to date, discuss interest and qualifications of candidate, and other information from the marketplace.		From this time on, it is difficult to give times to complete. Our experience shows that the best candidates are currently employed and happy where they are. The timetable from this point on will be dependent upon the calendar of candidates and people involved in the selection process.
<b>INTERVIEW AND APPRAISE CANDIDATES RSA IDENTIFIED. ALSO INCLUDE APPROPRIATE RESPONSES TO ADVERTISEMENTS. ALL CANDIDATE INTERVIEWS SHOULD BE APPROVED BY CLIENT</b>	Provide detailed resumes and salary information, and appraisals, including strengths and limitations.		
<b>CONTINUE TO CONTACT SOURCES AND CANDIDATES</b>	Keep candidate list filled with best possible qualified and interested people.  Interview and appraise any new candidates.		Ongoing process.
<b>BEGIN TO INTRODUCE CANDIDATES TO CLIENT</b>	Discuss strategy for best possible client "image."  Discuss whether to have group or one-on-one interviews.		

<b>CONDUCT REFERENCE CHECKS ON APPROPRIATE CANDIDATE</b>	Keep client informed on a timely basis.		
<b>ASSIST WITH ANY EMPLOYMENT NEGOTIATIONS</b>	Our experience shows that RSA should “try on” a salary level with candidates to avoid rejection or misunderstanding by candidate.		
<b>SELECTED CANDIDATE JOINS THE CLIENT ORGANIZATION</b>			

## **B: MEMBERS OF THE FIRM**

**Robert A. Sellery, Jr.**, Managing Director; M.B.A., Rutgers University; A.B., Princeton University. Bob Sellery has been a member of the not-for-profit community for over 30 years. He started as an academic administrator, and later became a development officer at Princeton University. He then served as a management consultant and executive search consultant at Booz-Allen & Hamilton and Paul Stafford Associates, Ltd. before establishing his own firm in 1990.

**Kathryn B. Wilson**, Vice President. M.S. Library Service, Columbia University; B.A. The George Washington University. Former president, The Clark Wilson Group, a publisher of behavioral assessments and training materials used in companies and organizations worldwide for human resource development. She has been a fundraising consultant and campaign manager.

Support is provided by a information technology associate and two administrative assistants. We have cultural and gender diversity within our firm:

**Howard J. Sartori**, Information Technology Associate. B.S. degree, electrical engineering, California State Polytechnic University. Mr. Sartori provides electronic, database and computer management support.

**Jane Song**, Administrative Assistant. B.A. degree in business management, University of Maryland.

**Marissa L. Bundy-Holmes**, Telephone and Reception. A.A. degree, graphic arts, Maryland Institute College of Art. Ms. Bundy-Holmes provides additional general administrative support.

## C: BACKGROUND SKETCHES

### ROBERT A. SELLERY, JR.

A native of Evanston, Illinois, Bob Sellery received his A.B. degree in history from Princeton University. Bob's M.B.A. degree is from Rutgers University. His M.B.A independent work included research on leadership in not-for-profit organizations and distance education.

Graduate study at Princeton University, Woodrow Wilson School of Public and International Affairs, "Leadership, Participation, and Policy Change." Independent work, *The Development and Evaluation of University Administrative Leadership*, December, 1971.

With this firm and his previous employer, Booz Allen Hamilton, Bob has recruited executives for corporate and not-for-profit organizations. In addition, Mr. Sellery has worked on organizational studies as a management consultant at Booz Allen. He has concentrated on finding senior executives on behalf of not-for-profit organizations since 1980.

Earlier, Bob was an academic administrator at Princeton University in a dean's office, working on finances, communications, admissions, alumni affairs and special events; and a development officer, responsible for individual, corporate and foundation support on behalf of International and Regional Studies.

Bob Sellery has guest lectured on career management at the Yale University School of Organization Management, and at Harvard University's John F. Kennedy School of Government.

As a volunteer Mr. Sellery currently serves on the board of a church related grants program for human service organizations. He has also chaired Princeton University's Alumni Council Committee on Athletics, served as a class officer, and a major gifts solicitor for the Class of 1960. He remains active with these organizations, and is former chairman of The Princeton Library in New York, and former president of The Princeton Club of Washington, DC.

Mr. Sellery and his family reside in Boyce, Virginia

## **KATHRYN B. WILSON**

Ms. Wilson brings to Robert Sellery Associates a background in fundraising and nonprofit management as well as experience the fields of publishing, training, and human resource development.

A native of New Canaan, Connecticut, Ms. Wilson received her B.A. degree with honors in American Studies from the George Washington University. Her M.S. in library service is from Columbia University, and she completed graduate work in American Studies at Emory University with an emphasis on American philanthropy.

Ms. Wilson joined the firm in 2001 after serving as director of publishing and president of the Clark Wilson Group, a publisher of assessment and training materials for managers and leaders. Clark L. Wilson, Ph.D., an industrial psychologist and Ms. Wilson's father, is credited with introducing the concept of 360-degree feedback to the management training and development field through his development of the Multi-Level Management Surveys in 1970.

Previously, Ms. Wilson worked in the nonprofit community as a fundraiser. She was director of development for the Nexus Contemporary Art Center, Atlanta, Georgia, and a fund-raising consultant and campaign manager for an AAFRC fund-raising consulting firm. Clients included independent schools, libraries, museums, and religious organizations. She also served in two professional librarian positions at Virginia Tech.

Ms. Wilson's publications include articles on fund-raising, philanthropy, and interlibrary cooperation. She has been a member of the Association of Fundraising Professionals, American Society of Training and Development, Association of Test Publishers, Instructional Systems Association, Society of Industrial Organizational Psychologists, and the American Library Association.

Ms. Wilson has been invited to speak at forums on career development and executive search.

Volunteer activities include: St. Alban's Episcopal Church, Washington, D.C.: Vestry, Resource Management Committee, and Endowment Committee, and Secretary and Board member of the Cathedral Avenue Cooperative (residential building), Washington, DC. Ms. Wilson also served with the Georgia Shakespeare Festival as a founding member of the Board of Directors; and at the Carter Center of Emory University as assistant to the director of the Center's \$25 million national fund-raising campaign where she wrote an information booklet used by President Carter to recruit leadership.

Ms. Wilson and her husband, writer and art critic Stephen May, reside in Washington, D.C. and mid-coast Maine.

## CONFIDENTIAL

### D: REPRESENTATIVE LIST OF COMPLETED ASSIGNMENTS

Adelphi University (NY)  
American Association of Fund Raising Counsel, Inc.  
American Bar Association  
American Bible Society  
The American College  
American Enterprise Institute  
American Foreign Service Association  
American Guild of English Handbell Ringers  
American Horseshows Association  
American Institute of Physics  
American Psychological Association  
American Red Cross  
American Society for the Prevention of Cruelty to Animals  
The American University  
American University in Beirut  
AHC (Formerly Arlington (VA) Housing Corporation)

B'nai B'rith Home and Hospital (now Memphis Jewish Home, TN)  
Boys Clubs of America (now Boys & Girls Clubs of America)  
Bread for the World  
Bryan Memorial Hospital (NE)  
Bryant College (RI)  
Bucknell University  
Butler University

The Catholic University of America  
The Character Education Partnership  
American Chemistry Council, (Formerly Chemical Manufacturers Association)  
CHEMSTAR<sup>®</sup> Department  
The Children's Village (NY)  
The Civil War Trust  
Coast Guard (Academy) Foundation  
Cold Spring Harbor Laboratory  
The Coolidge Center for Environmental Leadership  
Corcoran College of Art and Design (DC)

DC Arc  
Direct Selling Education Foundation  
Duke University

Earthwatch Institute International  
The Eurasia Foundation

Exchange Carrier Standards Association

The Ford Foundation  
Fordham University  
The Foundation Center  
Future Homemakers of America

George Gund Foundation  
The George Washington University

Hanover College (IN)  
Harris Publishing Company  
Harvard Medical School  
Henry Street Settlement  
The Hill School (VA)  
Hobby Industries of America  
Howard Hughes Medical Institute

IBM Gallery of Science and Art  
Institute on Man and Science  
International Schools Service  
Instrument Society of America

The Jane Goodall Institute

Lafayette College

Marymount Hospital (OH)  
Massachusetts General Hospital  
Mayo Clinic  
Metropolitan Museum of Art  
Merrill Lynch/Public Finance Group  
Motor and Equipment Manufacturers Association  
Muhlenberg Regional Medical Center (NJ)

National American Indian Housing Council  
National Audubon Society  
National Association for the Specialty Food Trade  
National Captioning Institute  
National Cathedral School  
National Gallery of Art  
National Geographic Society  
National Jewish Center for Immunology and Respiratory Medicine (CO)  
National Multiple Sclerosis Society  
National Society of Fund Raising Executives  
New England Aquarium

New School for Social Research  
New York Hospital - Cornell Medical Center  
New York Medical College  
New York State Historical Association  
New York University - Alumni Federation

Ohio Presbyterian Retirement Services Foundation

Pennsylvania College of Podiatric Medicine  
The Pennsylvania State University  
The Pension Boards, United Church of Christ  
Phillips Exeter Academy  
Point Park College  
Polytechnic Institute of New York  
Pratt Institute  
Protestant Episcopal Cathedral Foundation  
Project Orbis

Rhode Island School of Design  
Rhodes College  
The Rockefeller Foundation  
The Rockefeller University  
The Rosemount Center (DC)  
Rubber Manufacturers Association  
Recording for the Blind & Dyslexic  
Reston Interfaith (VA)

Saint John's University (MN)  
SallieMae  
Seamen's Church Institute  
The Seeing Eye  
Shakespeare Globe Centre (North America) Inc.  
Shenandoah University  
Smithsonian Tropical Research Institute  
Stanford University, and its Medical Center  
Swarthmore College

Thomas Jefferson University  
Trinity College (DC)  
Tufts University, and its Medical School  
Tulane University

The Union Institute  
United Church of Christ, Pension Boards  
United Negro College Fund  
U.S. Department of Agriculture

U.S. Department of State  
University of Maryland, College Park  
University of Massachusetts Medical Center at Worcester  
University of North Carolina at Greensboro  
University of Tennessee at Memphis  
Urban Land Foundation  
Urban Land Institute

Vassar College

Washington National Cathedral  
Wesley Theological Seminary  
Wireless Cable Association International  
The World Bank  
World Wildlife Fund/The Conservation Foundation

YMCA of Greater New York

NOTE: Corporate searches listed include sources in the not-for-profit sector, and searches for nonprofit organizations include sources in the corporate sector.

The above clients include Robert Sellery's experience while at Booz Allen & Hamilton (1972-1976), Paul Stafford Associates (1976-1990) and Robert Sellery Associates (1990-present), respectively.

Some of these assignments include organizations where the people we worked with are no longer there. *We will provide references on our work at any organization listed.*

These assignments were for presidents and CEOs, executive directors, development (fundraisers), communication, alumni, financial, membership, and program people. We have also searched for chief academic officers, school deans, toxicologists, and the director of a university art museum. The firm has also conducted training seminars on the search process, and salary surveys.

## E: ELECTRONIC CAPABILITIES

Many search firms are offering “electronic” searches for select management levels. We have studied these new products and approaches to executive search. We have upgraded our firm’s electronic capabilities and installed new systems to offer clients and candidates more time-efficient channels of communication, rather than “electronic advertising.”

**We believe in tailoring each search to our client’s individual needs.** Electronic systems cannot replace the time-tested and proven methods of an approach using a combination of “target organizations” and introductions to prospective candidates through sources known to us and captured in our database. In addition, because we work in **all functional areas, our networks are broader than a single functional area.** For instance, an executive director, president, or chief financial officer might have worked with a promising executive in another functional area at an earlier time in his/her career.

The **electronic capabilities** we have found most useful are:

- **Web page.** We make background information about our firm available at [www.sellery.com](http://www.sellery.com). By posting position descriptions on our Web page, candidates can review a position description, with links to the client Web page, instantaneously and in complete confidentiality. A candidate’s response time is dramatically shortened.
- **E-mail.** Provides instantaneous and secure communication. Candidate response time is dramatically shortened.
- **Scanners.** Provide more storage and retrieval capabilities of documents, ranging from resumes to annual reports.
- **Relational databases.** Provide personal and organizational searches about people and the places they have been employed.
- **Internet browsers.** Provide instant information about size, services and personnel in target organizations.
- **Social networking websites.** We use the tools available on the internet, such as Google, Facebook, Linked-In, and others to obtain background information about candidates.
- **Video-Conferencing.** Used selectively to interview a promising candidate when search deadlines cannot be met through a face-to-face meeting. For example, an outstanding candidate is identified late in the search process. Rather than not include that candidate, we recommend a videoconference.

