



Charter Oak Recruitment Services
ATTN: Ryan Gousse, Business Development Coordinator
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407.923.6298

Northwest Florida State College

Presidential Search

1. Firm name, location, and representative

Charter Oak Recruitment Services
Grant Underwood, Principal Recruiter
160 N Colony Road
New Haven, CT 06511
(937) 243-1772 | grant.underwood@charteroakrecruitment.com

2. Years in Business

Please [click here](#) to see LinkedIn resume of principal, Grant Underwood, who has over 10 years of experience.

3. Confirmation of Presidential Search Services Offered

<https://www.charteroakeducation.com/>

4. Evidence and Explanation of Presidential Search Experience

Equivalent Placements:

- Chief Operating Officer, Graymoor Retreat (Garrison, NY)
- Chief Financial Officer, Diocese of Nashville (Nashville, TN)
- Operations Manager, Candor & Co. (Atlanta, GA)
- Chief of Staff, Hand, Heart and Soul Project (Atlanta, GA)
- Dean of Students, Bronx Global Institute for Girls Charter School (New York, NY)
- Executive Director, St. Francis (San Juan Bautista, CA)
- Academic Dean, Alma del Mar Charter Schools (New Bedford, MA)
- Dean of Culture and Community, Ascend Learning (Brooklyn, NY)

5. Quoted Cost to Perform Presidential Search

Please see Engagement Letter attachment on pages 5-7.

6. Timeline to Perform Presidential Search

Search Launch – 1 Day

Candidate Sourcing – 30 to 60 Days

Initial Interview – 15 Days

Onsite Interview – 15 Days

Offer Decision – 7 Days

7. Proposed Process to Perform Presidential Search

Our Five-Step Approach

1. **Search Launch (1 Day):** Charter Oak partners Charter Oak partners with schools to align on the profile calibration and goals for each job opening. By completing a simple online intake form and providing a detailed position description, our partners help us create personalized search parameters and targeted outreach messages.
2. **Candidate Sourcing (30-60 Days):** Charter Oak finds and creates a dynamic pool of candidates aligned with each school partner's mission, needs, and values. We leave no stone unturned in saturating the market. While we specialize in referral campaigns, LinkedIn enterprise, RocketReach enterprise, Grayscale for enterprise, and strategic job postings, we tailor our partners' sourcing needs to the intricacies of each unique search.
3. **Initial Interview (15 Days):** Charter Oak creates unique candidate pools for each school based on the profile calibration from Step 1. We focus on the logistics of the search: details often inadvertently deprioritized such as commute times, salary expectations, certification, sponsorship needs, and start date. That way, once candidates get to our partners, the school is ready to focus on interviewing against competencies.
4. **Onsite Interview* (15 Days):** Charter Oak empowers our school partners to have complete control over the selection, vetting, reference, and hiring process. Once we introduce candidates that meet the client's criteria, they can decide how to execute their own interviews. Of course, Charter Oak is always available to offer expert guidance on candidate visits, offer reviews, reference checks, and onboarding transitions.
5. **Offer Decision* (7 Days):** The school decides whether to extend an offer. If an offer is extended, Charter Oak can also advise on how to help the candidate get to clarity on whether to accept. On average, two out of every three Charter Oak candidates accept their offer.

***Additional Services Provided to Client for End-To-End Search** – Charter Oak will provide these End-To-End services that will help advise and engage all stakeholders

up until the offer is signed:

- **Onsite Interview Logistics:** Aligning candidate and hiring team availability; sending clients detailed confirmation email; hosting a preparation call with candidate (upon client's discretion); hosting onsite interviews for a maximum of two interview days, approximately 7 AM – 5 PM or similar (additional cost applies for recruiter on-site hosting).
- **Advising on Competencies and Interview Modules:** Propose set of Leadership Competencies for committee to workshop, amend, and make unique to needs of individual search; Propose phone and onsite interview modules pertaining to relevant competencies.
- **Candidate Matriculation Plan:** Propose and execute a candidate matriculation plan for a successful candidate, to maximize chance of accepted offer and clear expectations leading up to candidate's start date.
- **Reference Checks:** For each candidate with a verbal offer, provide a reference report detailing 2-3 professional references and a recommendation based on the reference data. (Note: FBI Criminal Background check, DMV Record Check, Educational credential verification, and previous Employment Verification are not available by default, but all are available for an additional \$1,500).

8. List of the firm's staff intended to be assigned to the project

Grant Underwood, Principal Recruiter

9. Three references

Charter Oak Recruitment grants permission to contact the references below.

Robyn Tedder

CEO, Candor & Co Consulting
rtedder@candorandcoconsulting.com
 860-716-4758

Libby Merrill

Director of Talent, Alma Del Mar
libbymerrill@almadelmar.org
 401-864-8157

Kristen Nielsen

Partner, Green Line Talent Group

kristen@greenlinetalentgroup.com

10. Disclosure of any personal, familial, employment, or vendor relationship between a principal or employee of firm and Northwest Florida State College, its trustees, president, or employees in the preceding 5 years.

Charter Oak Recruitment has no personal, familial, employment, or vendor relationship with Northwest Florida State College, its trustees, president, or employees.

**ATTACHMENT:
Recruitment Engagement Letter**



Northwest Florida State College
Recruitment Engagement Letter: President

Search Specifications

- This Agreement pertains to the President search for Northwest Florida State College (hereafter, "Hiring Partner").
- Charter Oak will share the salary range on the job description. The salary range is ____

- Charter Oak will share the targeted start date of _____ on the job description.

Sourcing Procedures

- We will commence work upon receipt of a signed copy of this agreement and payment of the Listing Fee.
- We will leverage our databases, networks, and general acumen to initial a regional/nationwide (as applicable) search.
- We will engage in initial interviews and thereafter present a field of the most competitive candidates.
- We'll be available to assist in any reasonable way before, during after employment of the final candidate.
- We'll execute recruitment efforts as quickly as possible without sacrificing quality or full market exposure.
- To comply with federal antitrust law, we don't honor anti-poaching agreements, regardless of whether they are formal or informal. See [here](#) for more.
- FBI Background Checks, employer verification, and educational verification are not included in this contract.

Media Procedures

- We will accept and process public candidate applications on your behalf in our Applicant Tracking System;
- We will use our networks and databases to post to as many job boards as we deem necessary for market saturation;
- We will recruit applicants on your behalf, communicating the job description; name, location, salary, and details about you, the employer; we'll disclose that Charter Oak works on behalf of you, the employer, for purposes of this search.

- To maintain employee engagement, we'll congratulate successful candidate on LinkedIn or via our website.

Fee Schedule

Our fee, payable by Hiring Partner, is in three phases: **\$300** listing fee; **\$6,000** sourcing fee; **\$6,000** placement fee, which is contingent upon successful signed offer of a Charter Oak candidate. The listing fee will be invoiced now; the sourcing fee will be invoiced no earlier than the date Charter Oak shares relevant applicants for this role; the placement fee will be invoiced no earlier than the date of candidate's signed offer.

On the Condition of Multiple Hires Resulting from this Agreement

If Hiring Partner hires more than one candidate referred by Charter Oak resulting from the Scope of Work in this contract, the payment schedule for all hires after the first is: **\$12,300** flat rate (Retention Quality Assurance is an extra optional add-on), to be invoiced no earlier than date of candidate's offer acceptance. Invoices payable 21 calendar days from invoice date. Except for tax-exempt institutions, applicable sales and service taxes are added. We reserve right to include as salary any expected bonus, commission or guaranteed increase in salary which is part of the initial employment offer. Hiring Partner may elect to add the Quality Assurance Guarantee for an additional cost (see below).

Charter Oak's Retention Quality Assurance Guarantee

*The Hiring Partner shall have the option to add the below Retention Quality Assurance Guarantee for an additional price of **\$3,075** added to the Listing Fee. The benefits of the Retention Quality Assurance are as follows:*

If Hiring Partner terminates the successful candidate within 90 days of start date, or if the successful candidate resigns/reneges within 90 days of start date, Charter Oak will redo the search at no cost to the Hiring Partner. Continued employment shall be assumed by default unless Hiring Partner furnishes documentation of resignation or termination of employee. Changes or decreases in roles/responsibilities or shifting employee to an alternative role does not constitute termination or resignation.

Note: Different durations of quality assurance guarantees are available upon request. Additional pricing may apply.

_____ YES, the Hiring Partner wishes to add the Retention Quality Assurance Guarantee for the additional cost outlined above.

_____ NO, the Hiring Partner does not wish to add the Retention Quality Assurance Guarantee. Therefore, the Hiring Partner hereby waives access to Charter Oak's Retention Quality Assurance policy in the event the new hire reneges on their offer before their start date, resigns from their position within 90 days after start date, or is terminated within 90 days after their start date.

Referral Definition

Fee applies to candidates referred by us for a specified or alternate position and employed in any

capacity by you (or another entity resulting from subsequent referrals by you), within 12 months from date of our last referral of a candidate.

Background Inquiries

Please notify us immediately if you require Charter Oak to perform additional background checks, including criminal background checks or other placement screenings of the candidate. We will conduct such additional checks or screenings only if they are described in a signed, written amendment to this Fee Schedule & Guarantee.

Name of Charter Oak Representative (Print)

Name of Hiring Partner Representative (Print)

Signature of Charter Oak Representative

Signature of Hiring Partner Representative

Date Signed by Charter Oak Representative

Date Signed by Hiring Partner Representative