

# AGB SEARCH

Advancing Higher Education Leadership

Finding Your Next  
**PRESIDENT**

UNIVERSITY OF IOWA

Submitted October 26, 2020



Advancing Higher Education Leadership

October 26, 2020

Mark Braun  
Executive Director  
Board of Regents, State of Iowa  
11260 Aurora Avenue  
Urbandale, IA 50322

Dear Mr. Braun:

AGB Search is pleased to submit this proposal to provide executive recruitment services to find the next President of the University of Iowa. With over 220 successful presidential searches, we have extensive experience identifying and recruiting highly qualified leaders for private colleges and universities, public higher education institutions, university systems, and institutionally-related foundations.

We are proposing Dr. James McCormick, Ms. Janice Fitzgerald, and me as your search consultant team. Our expertise in university leadership and executive search consulting will benefit the University of Iowa with a pool of quality candidates vetted for their credentials, character, and commitment to your mission and vision.

Dr. McCormick and Ms. Fitzgerald are an effective team of consultants, having completed more than 50 executive leadership searches for higher education institutions; their expertise is in identifying leadership at the presidential, chancellor, CEO, and system-head levels. Their searches for presidential leadership include Idaho State University, Iowa State University, the University of Montana, the University of North Dakota, Valley City State University, and the Kentucky Council on Postsecondary Education.

Dr. McCormick is Chancellor Emeritus of both the Minnesota State Colleges and Universities system and the Pennsylvania State System of Higher Education. He knows presidential leadership firsthand as President Emeritus of Bloomsburg University of Pennsylvania. Ms. Fitzgerald served as Chief of Staff and Deputy Chancellor for the Minnesota State Colleges and Universities system, and has addressed systemwide policies, procedures, and practice with the system's higher education governing boards in Pennsylvania and Minnesota.

Dr. McCormick and Ms. Fitzgerald are co-authors of the [agbsearch.com](http://agbsearch.com) blog post, *Change Is Inevitable: Preparing for a Leadership Transition*, which identifies key steps in institutional planning for a presidential turnover.

As AGB Search's Managing Principal, I oversee all searches conducted by the firm, and the University of Iowa can be assured that I will always be available to answer any questions or address any concerns. Please feel free to contact me at (202) 776-0854 or [rod.mcdavis@agbsearch.com](mailto:rod.mcdavis@agbsearch.com).

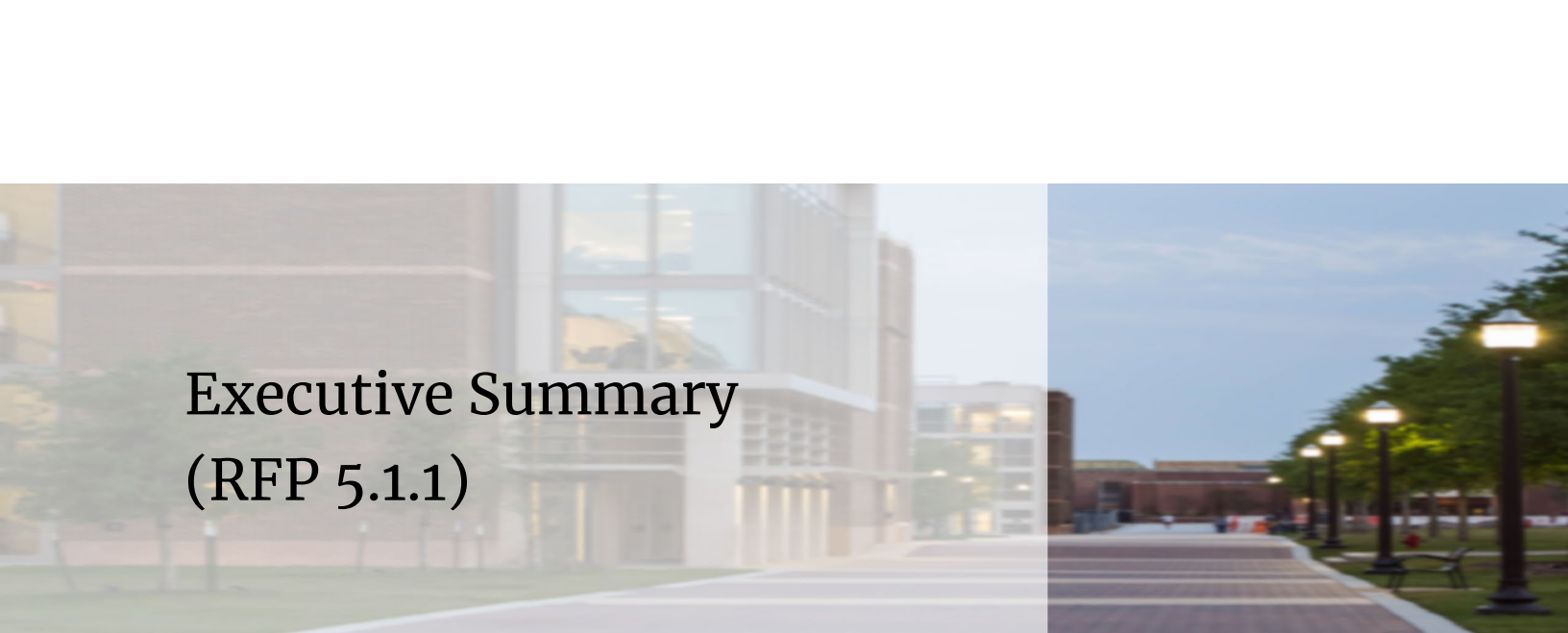
Sincerely,

A handwritten signature in black ink that reads "Roderick J. McDavis".

Roderick J. McDavis, Ph.D.  
Managing Principal

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# Executive Summary

## (RFP 5.1.1)

AGB Search's executive search consultants will conduct a successful search that engages the Board of Regents and interested stakeholders identified by the university; meets their expectations for professionalism and experience; and culminates in the identification, recruiting, vetting, and appointment of a highly qualified candidate for the position of President.

Our search process begins with campus visits, virtual or in-person, and communication with the Regents, Search Committee, university constituent groups, and other stakeholders identified by the Board and the University. This gives voice to all interested parties and is the first step to creating the leadership profile. Drs. McDavis and McCormick and Ms. Fitzgerald will assist the Board in creating the leadership profile and a communication and advertising plan to reach potential candidates. We will identify passive candidates through each consultant's professional network and the professional networks of their colleagues.

Diversity is a cornerstone belief of our firm and a principle of our recruiting efforts. We are proud that 50 percent of our placements of presidents and/or chief executive officers are women and/or people of color. The search for the University of Iowa's next president will include a highly qualified, diverse candidate pool.

Research associates are an integral part of AGB Search's executive search process. The Research Associate assigned to your search assists Drs. McDavis and McCormick and Ms. Fitzgerald by contacting candidates to announce the opportunity and invite interest in the position. For every candidate who advances, the Research Associate conducts an extensive internet review, as well as document searches (e.g., Nexis, CourtLink); AGB Search also verifies academic degrees, conducts background investigations, and scans a number of social media sites through two outside vendors.

AGB Search handles administrative matters including letters of advancement/non-advancement and maintains a secure website for the Search Committee to review candidate applications. Drs. McDavis and McCormick and Ms. Fitzgerald work with the Search Committee to design a candidate assessment matrix to evaluate candidates without bias.

As the search progresses, Drs. McDavis and McCormick and Ms. Fitzgerald can act as intermediaries between the University and the candidate of choice to ensure expectations are understood and agreed upon. AGB Search offers a commitment that, should the appointed candidate leave within one year of appointment, we will return to conduct a search for a new candidate on an expenses-only basis.

Our complete search process, with timetable, milestones, and deliverables is presented in the following pages.



# About AGB Search

AGB Search, a national search firm founded in 2010 by the Association of Governing Boards of Universities and Colleges, is focused exclusively on higher education. AGB Search has assisted with over 220 successful presidential searches, and in total, more than 700 full-time executive and interim searches at over 400 institutions and organizations, including land-grant, sea-grant, and space-grant universities. Our work spans 46 states and the U.S. territories of Puerto Rico and Guam. The public and private colleges and universities we have served are both small and large institutions, with annual budgets below \$20 million and over \$1.5 billion, endowments ranging from \$25 million to \$7.3 billion, and total enrollments ranging from under 500 to more than 90,000 students.

On an annual basis, AGB Search conducts approximately 80-90 successful searches for higher education executives. We currently enjoy a **98% successful placement rate overall**. In addition to higher education searches, AGB Search offers interim executive search services and our Compensation Evaluation Service.

AGB Search brings a highly qualified, successful team of more than 40 executive search consultants, all with significant experience in recruiting, vetting, and mentoring prospective leaders in the field of higher education. Our team, supported by nine full-time professional research associates and our office staff, delivers customized search services to meet each client's specific requirements.

More than 90 percent of our search consultants are former Presidents or senior executives of public and private four-year institutions, state and university systems, and community and two-year colleges. This firsthand experience—which includes board, administrative, and faculty perspectives—gives AGB Search expertise and depth that is distinctive within the field of higher education executive search. Our team possesses unparalleled insight into the opportunities and challenges facing the next generation of higher education leaders and is well-positioned to attract a broad array of diverse candidates.

## The AGB Search Value Proposition

Through our deep expertise and commitment to our work, we deliver optimal results for our clients.



### EXPERTISE

AGB affiliation

Extensive higher education search experience

Highly qualified talent

Full suite of search services



### COMMITMENT

Focus on client success

Partnership approach

Respect for candidate relationships



### RESULTS

Diverse candidates and appointments

Appointment longevity

High client satisfaction

700+

CLIENT ENGAGEMENTS COMPLETED BY AGB SEARCH

90%

OF CONSULTANTS ARE FORMER PRESIDENTS OR SENIOR EXECUTIVES

50%

OF AGB SEARCH APPOINTMENTS ARE WOMEN OR PEOPLE OF COLOR

40+

PROFESSIONAL SEARCH CONSULTANTS FROM ALL HIGHER EDUCATION SEGMENTS

220+

SEARCHES COMPLETED FOR PRESIDENTS AND CHANCELLORS





# Our Commitment to Diversity and Inclusion

Diversity is a hallmark of all aspects of our searches. We seek candidates and nominees who reflect the full diversity of our campuses and our communities.

AGB Search does not discriminate in our hiring practices or candidate pool development on the basis of race, color, religion, sex (including pregnancy and gender identity), national origin, political affiliation, sexual orientation, marital status, disability, genetic information, age, membership in an employee organization, retaliation, parental status, military service, or other non-merit factor.

- If desired, we will provide anti-bias training to the University of Iowa Search Committee to support a culture of inclusive excellence in your institution.
- We will develop an assessment matrix to ensure that all candidates are evaluated using the same criteria and metrics.
- We will advertise in higher education trade publications and websites that signal your intention to recruit a diverse pool.

## Outcomes

Through targeted research and outreach efforts, we attract diverse pools of the most qualified candidates:

- Over the past three years, 50% of our appointments have been from underrepresented groups (38% women, 12% people of color).
- Of the 186 women we placed in senior executive positions since 2011, 64 have been appointed President or CEO.
- Five of our six principals are women, and of our team of consultants, 43% are women and 27% are underrepresented minorities. AGB Search's current staff is composed of 52% women and 29% underrepresented minorities.

## Distinguishing Firm Qualifications and Resources

Our dynamic team of principals and consultants is specifically focused on higher education. To advance higher education leadership, our firm invests in the development of resources and tools that enhance our search process and the field of higher education executive search.

### Differentiating Factors

- The knowledge and thought leadership of AGB. Our search process is founded on AGB's definitive publication, *A Complete Guide to Presidential Search for Colleges and Universities*, an indispensable guide that is applicable to searches for presidents, provosts, deans, vice presidents, and other Cabinet-level positions; selecting an appointee; defining a successful transition of leadership; and shaping institutional strategies for the future.
- Principals and consultants with firsthand knowledge of the functional areas of responsibility for presidents, chancellors, vice presidents, chief diversity officers, deans, and other leadership positions in higher education, which will allow us to effectively assess candidate qualifications, experience, domain expertise, and soft skills.
- Broad and deep search experience recruiting institutional and senior leaders for public research institutions including Iowa State University, Arizona State University, Cornell University, University of Wisconsin, University of Minnesota, The George Washington University, and many others.
- Expertise in developing pools of highly qualified, diverse candidates. We leverage the firm's network and database, and we conduct targeted research to identify candidates currently employed at minority-serving institutions (e.g., Historically Black Colleges and Universities [HBCUs], Hispanic Serving Institutions [HSIs], Tribal Control Colleges and Universities, and Federally-recognized Minority Serving Institutions).
- Our ability to recruit top passive candidates, as well as active candidates through our well-established network of contacts and market engagement.
- Reputation as credible and highly effective ambassadors for our client organizations.
- Partnership approach to client relations; highly communicative, responsive, and transparent.
- A year of transition support provided to your institution and the appointed candidate for onboarding/post-hire integration.



## Value-Added Services

**Anti-Bias Training.** At AGB Search we believe strongly that anti-bias training/coaching is valuable to successful organizational development. Building capacity and fluency in thinking, talking about, and acting towards equity and inclusion includes the development of shared language, shared experiences, and shared tools. We offer the following workshops to advance building a culture of inclusive excellence in your institution.

- I. **Creating an Inclusive Workplace: Managing Bias** (2.5 hours) – This session is intended to assist an Executive Team in becoming more culturally competent.
- II. **Anti-Bias Awareness and Coaching for All Employees** (2.5 hours) - This session is intended for all non-executive employees.
- III. **Creating Anti-Bias Safeguards in Human Resources** (2.5 hours) - This session is intended for Human Resource professionals.

**Predictive Index Behavioral Assessment.** An additional, optional assessment tool that AGB Search offers is the Predictive Index (PI) Behavioral Assessment. The PI Behavioral Assessment measures motivating drives in the workplace and can be used in conjunction with traditional screening methods such as résumé review, interviews, and reference checks. AGB Search can provide additional information about the PI Behavioral Assessment upon request.

**Predictive Index Cognitive Assessment.** In addition to the PI Behavioral Assessment, AGB Search also offers the PI Cognitive Assessment. The PI Cognitive Assessment consists of 50 multiple choice questions from three cognitive ability categories (verbal, numerical, and abstract reasoning) and nine subcategories. It is used to assess the rate at which a person can learn and process complex information.

**Competitive Executive Search Pricing for Returning Clients and Multiple Searches.** AGB Search offers competitive pricing for our returning clients and clients who award multiple searches that are conducted simultaneously.

**Competitive Executive Search Pricing for AGB Members.** AGB Search offers a competitive reduction on executive search fees for institutions that hold membership in AGB.

**AGB Consulting.** The University of Iowa will have access to AGB's proven solutions for higher education leadership to ensure financial strength, improve governance policies and procedures, and govern with confidence. AGB's Governance and Strategy & Transformation practice areas provide board and presidential customized assessments, composition and succession planning, development workshops, the creation and implementation of sustainable business strategies for institutional vitality, and support and guidance for higher education leaders instituting consequential change. Visit [AGB.org/Consulting](http://AGB.org/Consulting) to learn more.

## Complimentary Resource Package

AGB Search is committed to supporting the University of Iowa. We recognize that you are navigating the significant disruption in higher education that has been caused by the COVID-19 pandemic. As an affiliate of the Association of Governing Boards of Universities and Colleges (AGB) that is committed to advancing higher education leadership, AGB Search is pleased to offer a complimentary package of resources.

AGB Search's complimentary resource package includes:

**Complimentary one-year AGB Membership for Non-AGB Members.** You will be joining 2,000 institutions and 40,000 members. AGB membership enables boards, leaders, and board professionals to apply best practices throughout their operations; use director education to drive continuous improvement; anticipate emerging trends, risks, and challenges; and understand the impact of regulations and policies.

**Complimentary registration for the 2021 AGB National Conference on Trusteeship.** Since 1921, AGB has convened experts and practitioners for a formal, national conference with one purpose: to enable governing boards to future-proof colleges and universities. That mission has never been more important than it is today. The 2021 AGB National Conference on Trusteeship will be held virtually due to the COVID-19 pandemic.

**Complimentary registration for the 2021 AGB Foundation Leadership Forum.** A not-to-be-missed event, AGB's Foundation Leadership Forum will ensure that you return to your boardroom inspired, energized, and better equipped and connected than ever to lead with confidence. The 2021 AGB Foundation Leadership Forum will be held virtually due to the COVID-19 pandemic.

**Complimentary registration for your Board Chair and President for the 2021 AGB Institute for Board Chairs and Presidents.** AGB's Institute for Board Chairs and Presidents allows chair-president teams to develop robust partnerships and create a focused agenda that moves both the board and the institution forward. The 2021 AGB Institute for Board Chairs and Presidents will be held virtually due to the COVID-19 pandemic.

**Complimentary hard copies of publications from the AGB Resource Library.** As a thought leader in higher education, AGB has built an extensive library of resources to help you understand the issues confronting your organization, prepare yourself for effective boardroom performance, and fulfill your responsibilities as higher education leaders and trustees. Some of our recent reports include The AGB 2020 Trustee Index; Crisis Leadership for Boards and Presidents; and Risk Management: An Accountability Guide for University and College Boards.

# Complete Listing of Placements (RFP 5.1.2)

Following is a complete listing of higher education institutions for which AGB Search has provided search services.

|  |  |
|--|--|
| Agnes Scott College                      | Boise State University                   |
| Albion College                           | Bowie State University                   |
| Albizu University                        | Bridgewater College                      |
| Alderson Broaddus College                | Broward College                          |
| Allegheny College                        | Bucknell University                      |
| Alma College                             | Buena Vista University                   |
| Alvernia University                      | California Institute of Integral Studies |
| American University of Iraq- Sulaimani   | California State University System       |
| Andover Newton Theological School        | California Western School of Law         |
| Angelo State University                  | Capital University                       |
| Arizona State University-Tempe           | Cardinal Stritch University              |
| Ashland University                       | Carlow University                        |
| Associated Colleges of the South         | Carroll College                          |
| Auburn University Montgomery             | Carthage College                         |
| Augsburg College                         | CCAC Educational Foundation              |
| Augustana College                        | Centenary College                        |
| Austin College                           | Central College                          |
| Austin Peay State University             | Central Connecticut State University     |
| Ave Maria University                     | Central Methodist University             |
| Baker University                         | Central Piedmont Community College       |
| Baldwin Wallace University               | Centre College                           |
| Ball State University Foundation         | Chicago State University                 |
| Baptist Theological Seminary at Richmond | Christian Theological Seminary           |
| Barry University                         | City Colleges of Chicago                 |
| Bay State College                        | City University of Seattle               |
| Baylor University                        | Claflin University                       |
| Bellarmino University                    | Clarion University                       |
| Benedictine University                   | Clark Atlanta University                 |
| Bennett College                          | Clarkson University                      |
| Bethany College                          | Cleveland Chiropractic College           |
| Bethune-Cookman University               | Coalition for College Cost Savings       |
| Blackburn College                        | Coe College                              |
| BloodCenter of Wisconsin                 | Colby-Sawyer College                     |

College of Charleston  
College of DuPage  
College of St. Scholastica  
Columbia College  
Columbus State Community College  
Columbus State University  
Community College of Philadelphia  
Concordia College  
Connecticut Board of Regents  
Cornell University  
Cottey College  
CSU Fresno  
Culver-Stockton College  
CUNY Kingsborough  
Dakota State University  
Dartmouth College  
Delaware College of Art & Design  
Delaware County Community College  
Des Moines University  
Dickinson State University  
Dominican College  
Drake University  
Drew University  
Dunwoody College of Technology  
Duquesne University  
East Texas Baptist University  
Eastern University  
Edmonds Community College  
Edward Waters College  
Embry-Riddle University - Prescott  
Emory University  
Emporia State University  
Fairfield University  
Fairleigh Dickinson University  
Fairmont State University  
Fayetteville State University  
Ferrum College

Fisher College  
Fisk University  
Flagler College  
Florida Polytechnic University  
Florida State College at Jacksonville  
Fort Hays State University  
Franklin College of Indiana  
Fresno Pacific University  
Friends University  
Gammon Theological Seminary  
Garrett-Evangelical Theological Seminary  
Georgetown College  
Golden Gate University  
Gonzaga University  
Governors State University  
Graceland University  
Grand Rapids Community College  
Grand View University  
Guilford College  
Gustavus Adolphus College  
Hamline University  
Hanover College  
Harold Washington College  
Harris-Stowe State University  
Harry S Truman College  
Hartford Seminary  
Hartwick College  
Hastings College  
Heidelberg University  
Helena College University of Montana  
Henry Ford College  
Hood College  
Hope College  
Housatonic Community College  
Howard University  
Huston-Tillotson University  
Idaho State University

Illinois Board of Higher Education  
Illinois College  
Independent Colleges and Universities of Texas  
Indian River State College  
Indiana Tech  
Indiana University - Purdue University, Indianapolis  
Iowa State University  
Iowa Wesleyan University  
Ithaca College  
Jacksonville University  
Johnson C. Smith University  
Johnson County Community College  
Juniata College  
Kansas Wesleyan University  
Kennedy-King College  
Kent State University  
Kentucky Council on Postsecondary Education  
Kenyon College  
La Salle University  
Lake Erie College  
Lake Land College  
Lake Region State College  
Lancaster Theological Seminary  
Lebanon Valley College  
LeMoyne-Owen College  
Lewis-Clark College  
Liberty University  
Limestone College  
Lincoln Christian University  
Linfield University  
Longwood University  
Lorain County Community College  
Loras College  
Louisiana State University - Alexandria Foundation

Louisiana Board of Regents  
Louisiana State University - Shreveport Foundation  
Louisiana State University Alumni Association  
Louisiana State University Foundation  
Lourdes University  
Loyola University Chicago  
Luther College  
Lycoming College  
Lynn University  
Maine Maritime Academy  
Malcolm X College  
Manhattanville College  
Marian University  
Marietta College  
Marshall University  
Marygrove College  
Maryland University of Integrative Health  
Marymount California University  
Mayville State University  
Mercyhurst University  
Metropolitan State University of Denver  
Miami Dade College  
Midwestern State University  
Millikin University  
Millsaps College  
Minneapolis College of Art and Design  
Minnesota State Colleges and Universities  
Misericordia University  
Mississippi College  
Missouri Western State University  
Monmouth College  
Monmouth University  
Montana State University  
Montana Technical University  
Montana University System  
Morningside College

Mount Aloysius College  
Mount Carmel College of Nursing  
Mount Mercy University  
Mount Saint Joseph University  
Mount St. Mary's University  
Muskingum University  
Nashville State Community College  
National Center for Higher Education  
Management Systems  
National Council for State Authorization  
Reciprocity Agreements  
National University  
Nazareth College  
Nebraska Wesleyan University  
Nevada System of Higher Education  
New Jersey City University  
New Mexico State University  
New York State Education Department  
NewSchool of Architecture and Design  
North Dakota State University  
North Dakota University System  
Northwestern College  
Northwestern Connecticut Community  
College  
Northwestern University  
Notre Dame of Maryland University  
Oakland City University  
Oakland University  
Oglethorpe University  
Ohio Foundation of Independent Colleges  
Ohio Northern University  
Ohio Wesleyan University  
Old Dominion University  
Olive-Harvey College  
Our Lady of the Lake University  
Owens State Community College  
Pacific Lutheran College  
Pacific School of Religion

Palmer College of Chiropractic  
Palo Alto University  
Patten University  
Pittsburgh Theological Seminary  
Point Park University  
Presbyterian College  
Presentation College  
Prince George's Community College  
Quest University Canada  
Radford University  
Ramapo College  
Raritan Valley Community College  
Regis University  
Reinhardt University  
Rensselaer Polytechnic Institute  
Richard J Daley College  
Rider University  
Ringling College of Art and Design  
Rocky Mountain College  
Sacred Heart University  
Saginaw Valley State University  
Saint Joseph's College, Maine  
Saint Joseph's College, New York  
Saint Louis University  
Saint Mary's College of California  
Saint Mary's University of Minnesota  
Saint Michael's College  
Saint Xavier University  
San Diego State University  
San Francisco State University  
San Jose State University  
Santa Fe College  
Sarah Lawrence College  
Schreiner University  
Seminole State College of Florida  
Seton Hall University  
Shepherd University

Sierra Nevada College  
Simmons University  
Simpson College  
Slippery Rock University  
South Dakota Board of Regents  
South Dakota School of Mines and Technology  
South Texas College of Law Houston  
Southeastern University  
Southern Connecticut State University  
Southwestern College  
Southwestern University  
St John's University  
St. Catherine University  
St. Cloud State University  
St. Edwards College  
St. Joseph's College New-York  
St. Louis College of Pharmacy  
State Higher Education Executive Officers Association  
Stetson University  
Stockton University  
Strategic Management Society  
Suffolk University  
Sul Ross State University  
SUNY Adirondack  
SUNY Brockport  
SUNY Geneseo  
Tacoma Community College  
Texas A&M International University  
Texas A&M University Kingsville  
Texas A&M University San Antonio  
Texas Christian University  
Texas Lutheran University  
Texas State University  
Texas Tech University  
Texas Wesleyan University  
Texas Woman's University

Thaddeus Stevens College of Technology  
The Catholic University of America  
The College of New Jersey  
The College of Wooster  
The George Washington University  
The Morgridge Institute for Research  
Theodore Roosevelt Presidential Library Foundation  
Thomas Edison State College  
Thomas More University  
Transylvania University  
Trinity University  
Tuskegee University  
Union College  
Union Institute and University  
United States Naval Academy Foundation  
University at Buffalo Foundation  
University of Alabama at Birmingham  
University of Alaska Foundation  
University of Central Florida Foundation  
University of Central Missouri  
University of Dallas  
University of Detroit Mercy  
University of Evansville  
University of Findlay  
University of Guam  
University of Houston Downtown  
University of Idaho  
University of Jamestown  
University of Louisiana at Lafayette  
University of Maine Foundation  
University of Minnesota - Crookston  
University of Minnesota  
University of Montana  
University of Mount Union  
University of Nebraska  
University of New England



University of North Carolina Asheville  
University of North Dakota  
University of Northern Iowa  
University of Pittsburgh at Bradford  
University of Puget Sound  
University of Rio Grande/Rio Grande  
Community College  
University of San Diego  
University of Scranton  
University of South Alabama  
University of South Carolina  
University of South Dakota  
University of the District of Columbia  
University of the Ozarks  
University of the Southwest  
University of Utah  
University of West Florida  
University of Wisconsin - Oshkosh  
University of Wisconsin - Stout  
University of Wisconsin Colleges  
University of Wisconsin Colleges - Sheboygan  
University of Wisconsin Colleges - Barron  
County  
University of Wisconsin La Crosse  
University of Wisconsin Platteville  
University of Wisconsin Population Health  
Institute  
University of Wisconsin Stevens Point  
University of Wisconsin System  
University of Wyoming  
Upper Iowa University  
Ursinus College

Valencia College  
Valley City State University  
Valparaiso University  
Vanderbilt University  
Virginia Commonwealth University  
Wabash College  
Wake Technical Community College  
Walla Walla Community College  
Warren Wilson College  
Wayland Baptist University  
Webster University  
Wells College  
West Texas A&M University  
West Virginia Higher Education Policy  
Commission  
West Virginia State University  
Western Association of Schools and Colleges  
Western Connecticut State University  
Westminster College  
Wheaton College  
Wheelock College  
Widener University  
Wiley College  
Wilkes University  
William Jewell College  
William Paterson University  
Wilmington College  
Winthrop University  
Wittenberg University  
Wofford College  
York College of Pennsylvania  
Youngstown State University

# Managerial-Level Contact and Search Consultants (RFP 5.1.3)

AGB Search has given careful consideration to align the expertise of the firm with the needs of the University of Iowa. Your search team includes executive search consultants and a full-time research associate committed to serving your Search Committee and all stakeholders until the right candidate is appointed.

There is one constant thread running through our process: we listen intently to clearly understand your needs. Our firm is focused on your search with a full level of effort that is not limited by hourly restrictions or hampered by arbitrary closing dates. We will remain engaged until the search is completed to your satisfaction.

Your search team will be co-led by Drs. Roderick McDavis and James McCormick and Ms. Janice Fitzgerald, who together possess extensive knowledge, skills, and experiences that will enable them to quickly understand and assess your needs, compile an accurate position profile, and engage with candidates who will bring the requisite background to thrive as President of the University of Iowa.

Biographical sketches of Drs. McDavis and McCormick and Ms. Fitzgerald are included to provide an overview of their experience in academia, higher education leadership, and executive search consulting.

## AGB Search's Managerial Contact

**Roderick J. McDavis, Ph.D.**, is the primary point of contact for your search. As Managing Principal of AGB Search, Dr. McDavis oversees all executive searches, ensures that all searches are completed on time, uses his network to recommend potential candidates, and troubleshoots any potential issues. Dr. McDavis also will participate as an executive search consultant and advisor for the University of Iowa presidential search.

## Executive Search Consultants

### Dr. Roderick (Rod) J. McDavis, Managing Principal/Key Participant



Roderick McDavis, Ph.D., became the Managing Principal of AGB Search on March 1, 2017, after serving as president of Ohio University for 13 years. Dr. McDavis is responsible for leading and managing all components of AGB Search, including Executive Search, Interim Search, and Compensation Evaluation Service. In addition, he is responsible for developing new business opportunities for the firm and attending national higher education conferences to represent AGB Search. He also serves as an executive search consultant for some of the firm's searches.

Dr. McDavis was the first African American president of Ohio University and only the second alumnus to lead the university during its 214-year history. His contributions included assisting in the development of the

state of Ohio's technology commercialization implementation plan, the state's first guaranteed tuition plan – the Ohio Guarantee™ – and the first-of-its-kind performance-based funding model in the nation. He developed and implemented Ohio University's comprehensive strategic plan and was instrumental in the success of The Promise Lives Campaign, which raised over half a billion dollars in support of students and programs.

Some of the initiatives that were started during his tenure include The Urban Scholar and Appalachian Scholar programs, The Interlink Alliance partnership, the Century Bond Debt Management Strategy, the Ohio Innovation Fund, and the expansion of the Heritage College of Osteopathic Medicine to new campuses in Dublin and Cleveland.

He has held various academic and administrative positions at the University of Florida, the University of Arkansas, Virginia Commonwealth University, and Ohio University. Dr. McDavis served as chair of the Inter-University Council of Ohio, The Interlink Alliance, and the National Collegiate Athletic Association (NCAA) Division I Committee on Academics. He also was a member of the of NCAA Board of Governors, the NCAA Division I Board of Directors, and the Ohio Third Frontier Advisory Board.

Dr. McDavis was named the 2016 Alumnus of the Year by the Ohio University Alumni Association and he received the 2016 Diversity and Inclusion Medal of Excellence from Ohio University's Office of Diversity and Inclusion. The Dublin Chamber of Commerce named Dr. McDavis the 2016 Business Person of the Year for his involvement in the creation of the Heritage College of Osteopathic Medicine on the Dublin campus. He received the University of Arkansas' Silas Hunt Legacy Award in 2012, which recognizes African Americans for significant achievements and contributions to the community, the state, and the nation.

Dr. McDavis earned his B.S. degree in social sciences in secondary education from Ohio University, his M.S. degree in student personnel administration from the University of Dayton, and his Ph.D. in counselor education from the University of Toledo.

## RECENT SEARCHES

- **President**, University of Minnesota
- **President**, University of Nebraska
- **President**, Miami Dade College (In Progress)
- **President**, Ramapo College of New Jersey (In Progress)
- **President**, Santa Fe College
- **President**, Indian River State College
- **President**, Florida State College at Jacksonville
- **Interim President**, University of Toledo
- **Vice President for Academic Affairs and Provost**, University of South Carolina
- **Executive Vice President and Provost**, University of Montana
- **Provost and Executive Vice President for Academic Affairs**, The George Washington University
- **Provost and Vice President for Academic Affairs**, St. John's University (NY)

## Dr. James H. McCormick, Executive Search Consultant/Key Participant



James H. McCormick, D.Ed., joined AGB Search in 2011. Dr. McCormick's work for over 50 searches has focused upon public higher education leadership for universities, colleges, and community colleges and state system heads.

As the respected Chancellor Emeritus of the Minnesota State Colleges and Universities system, he began his term of office there in July 2001, and concluded service to the system in 2011. Before undertaking Minnesota leadership, Dr. McCormick was the founding chancellor of the Pennsylvania State System of Higher Education, created July 1, 1983, and also holds the title Chancellor Emeritus there. He was president of Bloomsburg University of Pennsylvania from 1973 to 1983, and was a professor and administrator for Shippensburg University of Pennsylvania in the preceding eight years.

A past chair of the Midwestern Higher Education Compact, Dr. McCormick also was a rotating chair of the Higher Education Advisory Council for the Minnesota Office of Higher Education. He was the founding chair of the Minnesota P-20 Education Roundtable/Partnership and has held leadership roles with numerous organizations, including the American Association of State Colleges and Universities and the National Association of System Heads, serving as national chair for the latter. Dr. McCormick was elected national chair of the State Higher Education Executive Officers; served on the SHEEO Executive Committee; and chaired the SHEEO Federal Relations Committee. He served on the Government and Public Affairs Commission for the American Council on Education and was a participant in the National Council of State Directors of Community Colleges, an affiliate of the American Association of Community Colleges. In 2007, Dr. McCormick was part of the Department of Education's Negotiated Rulemaking Committee for accreditation, and in 2008, he accepted a rare second term of service with the Association of Governing Boards' Council of Presidents. He also has served as a member of the William Mitchell School of Law board of trustees.

Dr. McCormick is recipient of several honors and recognitions, among them a citation for "model" leadership style in the publication, *Shared Visions of Public Higher Education Governance*. In 2002, the honor of an Ojibwe name was given Dr. McCormick by the Fond du Lac Reservation in Cloquet, Minnesota. The Association of Pennsylvania State College and University Faculties' prestigious Distinguished Friend of Higher Education Award was presented to McCormick in 2005. Other noteworthy awards given him came from the Minnesota Association of School Administrators with the Distinguished Service Award; the Minnesota Minority Education Partnership's Ron McKinley All My Relations Award; and in 2011, Minnesota's American Indian Conference Award.

Dr. McCormick is a frequent speaker, particularly on issues addressing characteristics of leadership, governance, workforce development, higher education opportunity for the underserved and underrepresented, and the public higher education access mission in universities and community colleges.

A graduate of Indiana University of Pennsylvania, Dr. McCormick earned Master's and Doctoral degrees from the University of Pittsburgh. He also has completed post-doctoral study at Columbia

University, the University of Michigan, and the John F. Kennedy School of Government, Harvard University.

## RECENT SEARCHES

- **Executive Director and CEO**, South Dakota Board of Regents
- **President**, Valley City State University (ND)
- **President**, University of North Dakota
- **Executive Director**, Illinois Board of Higher Education
- **President; Provost**, City Colleges of Chicago
- **President**, Dickinson State University (ND)
- **President**, Kentucky Council on Postsecondary Education
- **President**, Iowa State University
- **President; Provost**, University of the District of Columbia
- **Chancellor**, Montana Technological University
- **President**, University of Montana
- **President**, University of Northern Iowa

## Ms. Janice S. Fitzgerald, Executive Search Consultant/Key Participant



Janice S. Fitzgerald, M.A., M.Ed., has been an AGB Search Consultant since 2011. Ms. Fitzgerald's work for over 50 searches has focused upon public higher education leadership for universities, colleges, and community colleges and state system heads.

Ms. Fitzgerald served as Chief of Staff and Deputy Chancellor for the Minnesota State Colleges and Universities system from 2001 to 2011. As a part of the senior policy team for the college and university system during that time, she worked closely with the system's governing board, the chancellor, and college/university presidents on matters of policy, procedure, and practice systemwide.

Prior to joining the Minnesota State Colleges and Universities, Ms. Fitzgerald was the founding public relations and communications director for the State System of Higher Education in Pennsylvania. She left that office as the Executive Deputy for the system. Ms. Fitzgerald was director of public relations and publications at Cheyney University of Pennsylvania and an assistant professor of English there. She also taught as a graduate assistant at Villanova University and Carnegie Mellon University and has made presentations at numerous seminars, workshops, and conferences.

Ms. Fitzgerald has been recognized for academic and community honors, among them the National Association for Equal Opportunity Alumnus of the Year award. In addition, the Education Writers Association has selected her for the EWA and Johnson Foundation Wingspread Seminars in Racine, Wisconsin. Ms. Fitzgerald also has been recognized for organizational and crisis management skills.

Ms. Fitzgerald has contributed to the work of the Association of Institutions of Jewish Studies and was a founding member of the College and University Public Relations Association of Pennsylvania (CUPRAP). She served as secretary and vice president of the group and helped establish the CUPRAP Minorities in Communications Scholarship. Ms. Fitzgerald has held membership in the Modern

Language Association, Public Relations Society of America, the National Association of Women in Education, the Barbara Pym Society, and was a member of the state planning committee for the Pennsylvania American Council on Education-National Identification Program for Women.

Ms. Fitzgerald graduated magna cum laude with a Bachelor of Arts in English from Cheyney University of Pennsylvania, received the Master of Education from Cheyney University, and the Master of Arts from Villanova University. Doctoral course work in rhetoric and composition was undertaken at Carnegie Mellon University, and she completed the Program for Senior Executives in State and Local Government at the John F. Kennedy School of Government, Harvard University.

## RECENT SEARCHES

- **President**, Iowa State University
- **President**, Valley City State University (ND)
- **President**, Harry S Truman College (IL)
- **President**, Malcolm X College (IL)
- **President**, Richard J. Daley College (IL)
- **President**, Kentucky Council on Postsecondary Education
- **President; Provost**, University of the District of Columbia
- **President**, University of North Dakota
- **Chancellor**, Montana Technological University
- **Commissioner**, Louisiana Board of Regents
- **President**, University of Northern Iowa
- **President**, Emporia State University

## Level of Involvement

Drs. McDavis and McCormick and Ms. Fitzgerald are not bound by time constraints in conducting your search. Each of our executive search consultants will provide full effort in identifying, recruiting, and vetting candidates for the presidency of the University of Iowa. We remain engaged until an appointment is made and beyond.

## AGB Search Leadership

AGB Search's Managing Principal, **Dr. Roderick J. McDavis**, and Associate Managing Principal, **Dr. Melissa K. Trotta**, guide every aspect of the firm's proposals and searches. Supported by our office staff, Drs. McDavis and Trotta manage the client relationship above and beyond any specific search.

**Roderick J. McDavis, Ph.D.**, is the highly-respected President Emeritus, and the first African American president, of Ohio University and has decades of experience recruiting and mentoring leadership teams. He has completed executive searches for presidents and other senior leaders in higher education since joining AGB Search. Dr. McDavis ensures that all searches are completed on time, uses his network to recommend potential candidates, and troubleshoots any potential issues.

**Melissa K. Trotta, Ed.D.**, is the secondary point of contact and oversees all daily operations of AGB Search. Dr. Trotta brings 25 years of higher education experience as well as a broad array of search experience, including presidential and senior executive leadership searches, to her role. She is available to assist our clients throughout the search process with all matters both professional and administrative.



## The AGB Search Staff

Drs. McDavis and McCormick and Ms. Fitzgerald will be assisted at every stage of the search by the following dedicated team of professionals.

- **A full-time research associate** works to develop a diverse and abundant field of candidates. Our research associates (RAs) provide vital research and support to the team throughout the search process. RAs support the development of outreach strategies, advertising plans, and placing advertising; sourcing prospective candidates via our internal database, online platforms, other Internet research, and targeted email communications; collecting candidate data; and evaluating candidate alignment with respect to the client's desired attributes and required qualifications, including educational credentials and professional experience.

AGB Search's research associates are a highly analytical group of individuals who are committed to diligently performing this detail-intensive work. Our RAs have diverse educational and professional backgrounds that include executive search experience in higher education, retail, healthcare, and accounting; research in the fields of higher education, compensation evaluation, healthcare systems, business administration, and marketing; professional experience as college and university professors, and teachers and administrators at the secondary education level; and in institutional advancement, communications, accounting, commercial real estate, and banking positions. Once a contract to retain AGB Search's executive recruitment services is executed, a research associate is assigned to the team based on expertise and capacity, as well as the characteristics and requirements of the institution.

- **AGB Search consultants work collaboratively.** Candidates for this search may come from recommendations by other AGB Search consultants and their networks of contacts, which include numerous campus leaders, higher education associations, and other organizations. Your search will benefit from the connections and experience of the entire AGB Search team.
- **AGB Search's office staff will provide services** including contracting, accounting, and website support. They assist the consultants with ensuring that the search proceeds smoothly, that all materials are available, and that all questions are answered promptly.



# Our Experience & References (RFP 5.1.4)

AGB Search is a team of knowledgeable administrators and search professionals with decades of experience leading institutions, hiring and mentoring future leaders, and providing thought leadership to the higher education community. Our firm will:

- Engage our industry connections to cultivate a diverse pool for each position;
- Assess and discern the potential for each candidate's success in consideration of their credentials, character, and fit for the University of Iowa's unique environment; and,
- Remain invested in the search until a candidate is appointed and beyond to ensure an effective transition.

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To illustrate the depth and breadth of AGB Search's capacity, flexibility, and experience, we are pleased to present an overview of the methods that we employ to conduct remote searches, a representative list of the firm's placements of Presidents and related positions, and a representative list of the firm's placements of deans. Additionally, we have included executive search references from higher education institutions for Drs. McDavis and McCormick and Ms. Fitzgerald.

## Pandemic Response: Conducting Virtual Searches

In collaboration with each client's Search Committee, AGB Search has increased the utilization of videoconferencing platforms and adapted elements of our search process to maintain best practices to achieve the expected search deliverables. Our goal when conducting a virtual search is to recreate the key elements of an in-person search process.

We are currently conducting or have recently completed the following searches in a virtual or hybrid format: New York State Education Department's Board of Regents' search for their next Commissioner of Education and President of the University of the State of New York; the University of North Dakota's search for its Provost; Cornell University's search for their next Executive Director, Lab of Ornithology; Indian River State College's presidential search; Blackburn College's presidential search; Linfield College's Chief Information Officer search; Miami Dade College's presidential search; Kent State University's Provost search; Maine Maritime Academy's Provost search; and the University of South Dakota's Vice President of Health Affairs and Dean of the Sanford School of Medicine search.

Below are some of the approaches and flexible solutions that our firm has used to succeed.

- We have conducted remote semifinalist and finalist interviews using the preferred videoconferencing platform of our clients (i.e., Zoom, Microsoft Teams, Cisco Webex, GoToMeeting, etc.). Interviews have been structured to mirror traditional semifinalist and finalist itineraries. For example, semifinalist interviews have been scheduled in 1.5-hour blocks, allowing for one hour of questions by the Search Committee, followed by 15 minutes of questions from the candidate, with 15 minutes allotted for any unforeseen technology issues.

- During finalist interviews, we have sought to recreate what an on-campus visit would include, such as open forums. During a search at a small liberal arts college, meetings were spread over two weeks. The candidates met with faculty, staff, students, the Cabinet, Board members, and others, in addition to participating in an open forum and making a formal presentation on a topic provided by the institution, followed by a question-and-answer session. Other clients have chosen a 1-2-day format for each finalist interview.
- AGB Search has used video tours of campuses, the President's residence (for presidential searches), and the college/university community to provide candidates with information about our clients' campuses and their localities. To deepen candidates' understanding, video tours have been supplemented by PowerPoint presentations focused on the city/town and its locations of interest, amenities, schools, events, and activities.

These adaptations have been received positively by Search Committees, Boards, and candidates. Due to the broad and deep video interaction between the candidates and the Search Committee, institutions and candidates have been comfortable offering and accepting appointments without an in-person campus visit. We understand that each Search Committee will have a different vision for their process, comfort level conducting a search virtually (in whole or in part), and willingness to appoint candidates with limited in-person interaction. AGB Search is committed to working with the University of Iowa Search Committee to agree upon and execute an effective process while travel restrictions and health concerns persist.

## References

### 1. University of North Dakota

SEARCH: PRESIDENT (2020)  
 CONTACT: Terry Meyer, Deputy Chief of Staff  
 PHONE: 701.328.2963  
 EMAIL: terry.meyer@ndus.edu  
 CONSULTANT: Dr. McCormick and Ms. Fitzgerald

### 2. Idaho State University

SEARCH: PRESIDENT (2018)  
 CONTACT: Matt Freeman, Executive Director  
 PHONE: 208.332.1571  
 EMAIL: matt.freeman@osbe.idaho.gov  
 CONSULTANT: Dr. McCormick and Ms. Fitzgerald

### **3. Nevada System of Higher Education**

SEARCH: CHANCELLOR (2017)  
CONTACT: Dean Gould, Chief of Staff/Special Counsel to the Board of Regents  
PHONE: 702.889.8426  
EMAIL: dgould@nshe.nevada.edu  
CONSULTANT: Dr. McCormick and Ms. Fitzgerald

### **4. University of Nebraska**

SEARCH: PRESIDENT (2019)  
CONTACT: Jim Pillen, Chair, Board of Regents  
PHONE: 402.564.0407  
EMAIL: jpillen@nebraska.edu  
CONSULTANT: Dr. McDavis

### **5. The George Washington University**

SEARCH: PROVOST (2019)  
CONTACT: Tom LeBlanc, President  
PHONE: 202.550.0430  
EMAIL: eblanc@gwu.edu  
CONSULTANT: Dr. McDavis



## Schedule/Time Commitment (RFP 5.1.5)

Working with Search Committees is the heart of what AGB Search does, and we have experience guiding committees of all sizes, compositions, and backgrounds. The AGB Search process is designed to ensure that the Search Committee is deeply involved every step of the way.

Your Search Committee's needs and timeline drive the process. Your knowledge of the institution supports the creation of the position profile that allows us to recruit a strong group of candidates. Your stakeholders' passion ensures you hire the right candidate whose values and approach align ideally with those of the University of Iowa.

Drs. McDavis and McCormick and Ms. Fitzgerald will work closely with the Search Committee from the outset to review and create new materials and processes for recruitment. They will collaborate with the Search Chair and members of the Search Committee, as appropriate, to gain approval of the search process and documents. They also will prepare a recruitment plan and an advertising recommendation for the Search Committee's review and approval.

As the search nears the end of the recruiting period, the Committee's work will focus on candidate review and selection. A jointly drafted rating instrument (Candidate Assessment Matrix) helps provide consistency as Drs. McDavis and McCormick and Ms. Fitzgerald facilitate the collaborative process by which the Committee selects semifinalists and finalists for interviews.

Drs. McDavis and McCormick and Ms. Fitzgerald will be in frequent contact with the Search Chair throughout the search. They anticipate between four and six meetings with the Search Committee; some meetings may occur via conference call or video conference, if and when appropriate.

AGB Search is prepared to use teleconferencing and online meeting platforms such as Zoom, Skype, GoToMeeting, etc. to conduct Search Committee meetings, listening sessions, interviews, and other search process functions. The use of these platforms will be determined in conjunction with the University of Iowa Search Committee.

**HIGHER  
EDUCATION  
IS A HIGHLY  
COLLABORATIVE  
BUSINESS.**

## Schedule/Time Commitment

AGB Search will work closely with your Search Committee through the entire search timeline. Below are the steps you can expect during the process and a proposed schedule.

| MONTH 1   | MONTH 2  | MONTH 3   | MONTH 4  | MONTH 5   | MONTH 6   |
|---|--|---|--|---|---|
| 1.  | 2.   | 3.  | 4.   | 5.  | 6.  |
| <b>PREPARE AND RESEARCH NEEDS</b>   | <b>RECRUIT CANDIDATE POOL</b>  | <b>REVIEW CANDIDATES</b>  | <b>CONDUCT INTERVIEWS</b>  | <b>APPOINT NEW LEADER</b>   | <b>TRANSITION</b>   |
| November 2020   | December 2020 – January 2021   | January – February 2021   | March 2021   | April 2021  | July 2021   |
| <p>Hiring authority and/or Search Committee meet with Drs. McDavis and McCormick and Ms. Fitzgerald to determine timeline, outreach strategy and priorities, and characteristics sought.</p> <p>-----</p> <p>Drs. McDavis and McCormick meet with stakeholders to discuss opportunities and challenges of the position.</p> <p>-----</p> <p>AGB Search prepares advertising, recruitment plan, and position profile for Committee approval.</p> | <p>AGB Search initiates wide-ranging advertising and outreach strategy.</p> <p>-----</p> <p>Drs. McDavis and McCormick narrow focus on vetting most promising candidates.</p> <p>-----</p> <p>Rating instrument is developed to assess candidates.</p> | <p>Committee members review candidate files.</p> <p>-----</p> <p>Search Committee and consultants meet to select neutral-site (semifinalist) candidates and make/assign reference calls.</p> <p>-----</p> <p>AGB Search completes due diligence on semifinalists.</p> | <p>Search Committee hosts neutral-site or virtual interviews.</p> <p>-----</p> <p>Search Committee selects finalists, and AGB Search completes background checks.</p> <p>-----</p> <p>Campus hosts finalist interviews; Search Committee finalizes candidate assessment.</p> | <p>Drs. McDavis and McCormick support discussions with final candidate and communication of appointment.</p> <p>-----</p> | <p>Drs. McDavis and McCormick support successful transition of the newly appointed leader for one year.</p> |

As a full-service firm, AGB Search manages all search materials, including communications soliciting nominations and interest, acknowledgment of applications, correspondence with applicants, and letters of advancement and non-advancement. We create a confidential, secure website through which Search Committee members have continuous access to all candidate materials.

## **1. Organize the Search and Research Leadership Needs**

Our first responsibility is to thoroughly understand the University of Iowa and the qualities that the institution needs in a new President. Our consultants will visit the campus or conduct virtual meetings (e.g. Zoom, Skype, GoToMeeting, etc.) to interact with the Search Chair and Search Committee and to meet with Regents, Board office staff, campus administrators, faculty members, students, alumni, and community members, as appropriate. This inclusive process reveals the attractions and challenges of the position, as well as the characteristics and experience the successful candidate must possess.

In collaboration with the University of Iowa Search Committee, AGB Search will develop a comprehensive position profile to outline the position qualifications and ensure the collective expectations of stakeholders are represented.

## **2. Recruit a Talented Pool of Candidates**

AGB Search enhances its ongoing approach to recruiting viable candidates with tools such as Spark Hire (an interviewing platform), the Predictive Index's Behavioral Assessment, our proprietary database of more than 80,000 candidates, and the LinkedIn Recruiter platform. Directed by the experience, skills, and professional characteristics identified in the search profile, we will recruit a fresh pool of candidates tailored specifically to your leadership needs. The candidate pool we build will draw current and up-and-coming leaders, identified through:

### **The extensive networks of our consulting team.**

We recruit candidates who are not necessarily looking to change positions but could be attracted to the opportunity. Although Drs. McDavis and McCormick and Ms. Fitzgerald will lead the recruitment effort through their own extensive networks, they also will look to their professional colleagues' networks of contacts, which include numerous campus leaders, higher education associations, and other organizations. Your search will benefit from the connections and experience of the entire AGB Search team.

### **Identifying candidates from sources outside of higher education.**

If the Committee wishes, we can also seek candidates whose primary experience is in the corporate sector, other not-for-profit organizations, or public service, whose skills, background, and related experience match those in the profile, and who also have a deep understanding of the University of Iowa, as well as its culture and locale. This outreach may include alumni who want to return to serve their alma mater.

### **AGB Search's Washington, D.C., connections.**

AGB Search enjoys a robust network of key relationships in the Washington, D.C., area that includes leaders in the government, military, U.S. Foreign Service, and the U.S. Chamber of Commerce, as well as board and executive leaders at significant non-profit organizations.

### **Outreach to underrepresented groups.**

We will seek nominations from individuals at organizations that champion the advancement of current and future leaders from underrepresented groups, such as the Alliance for Equity in Higher Education, American Indian Higher Education Consortium, Hispanic Association of Colleges and Universities, American Association of Blacks in Higher Education, American Association of University Women, the National Association of Diversity Officers in Higher Education, the National Congress of American Indians, and the Rutgers Center for Minority Serving Institutions, among others.

### **Advertising in the leading higher education trade publications and websites.**

We will consider key higher education outlets that may include *The Chronicle of Higher Education*, *Women in Higher Education*, and the *Hispanic Outlook in Higher Education*, as well as websites such as DiverseJobs.com and InsideHigherEd.com. We also will consider position-specific websites and publications for advertising, such as the Association of Public and Land-grant Universities (aplu.org) and the International Association of University Presidents (iaup.org).

Drs. McDavis and McCormick and Ms. Fitzgerald will identify outstanding potential candidates and conduct initial screenings to learn as much as possible about their history, experience, level of interest in and understanding of the position and the University of Iowa, and specific circumstances of their candidacy. This focused effort brings high quality, pre-screened candidates to the Search Committee for their consideration.

## **3. Review and Evaluate Candidates**

We will work closely with the Search Chair and Search Committee through a collaborative process to discern the most qualified candidates. We will advise the Committee on best practices and assist them in developing a rating methodology that ensures fair and rigorous evaluation of credentials. The introduction of rigorous processes early in the search helps the Committee develop a keener sense of each candidate's strengths and potential. The Committee's selection of semifinalists to invite for interviews triggers the first round of due diligence, in which reference calls are initiated. We also conduct Internet (Google and other search engines), Nexis, and CourtLink reviews, as well as social media research, to identify potential issues that candidates may need to address.

## **4. Facilitate Interviews**

We will support the Search Committee through two rounds of in-person interviews: semifinalist interviews at an off-campus location (neutral site) and more extensive rounds of interviews for finalists. During the COVID-19 global pandemic, the Search Committee may wish to conduct these interviews virtually through interfaces such as Zoom or Skype. As part of the interview process for finalists, we also conduct additional due diligence, including "off-list" reference calls, which target individuals who can address specific areas of interest for finalists; extensive background checks, including driving, criminal, civil, and credit checks; and verification of all academic degrees and credentials.



## 5. Support Discussions and Appointment

By gathering compensation expectations and other information from the most promising candidates as the search progresses, we can inform the eventual discussions with the candidate of choice. If requested, Drs. McDavis and McCormick and Ms. Fitzgerald can also serve in an intermediary role during initial negotiations, working with the hiring authority and candidate of choice to assure there is a shared understanding of interests.

## 6. Presidential Transition Planning and Support

AGB Search provides transition planning for presidential searches for one year. Transition planning includes developing strategies to support, prepare, and ensure a successful launch and transition for the new president. We include this service as part of our process at no additional fee. A thoughtful and well-executed transition plan in the early months of a new leader's tenure supports the new President's first year in office and sets the stage for long-term success. With support and guidance from Drs. McDavis and McCormick and Ms. Fitzgerald we will ensure that the University of Iowa and the President-elect are prepared for and committed to a successful leadership transition.

## Our Commitment

We are committed to our work and to your success. If the University of Iowa is unable to identify a candidate of choice for its next President within the initial timeline, we will continue the search process until a successful appointment is made. Furthermore, if the candidate appointed leaves office during the first year, we will return to assist in a follow-up search on an expenses-only basis. A full description of AGB Search's commitment and Limited Warranties is included in the Fee Structure section of this proposal.



# Search Engagement Deliverables

Drs. McDavis and McCormick and Ms. Fitzgerald will provide the following deliverables with the support and assistance of other AGB Search staff as appropriate.

1. **A pre-search study**, which includes virtual or in-person meetings with representatives from the faculty, staff, students, and other constituents to define a common understanding of the needs of the University of Iowa and an agreement on desirable leadership attributes for the position. This stage of the process will include a kick-off meeting between the AGB Search team and the Search Committee.
2. **A final comprehensive search profile**, which will include all the necessary information about the position, the University of Iowa, and the community to attract outstanding candidates.
3. **Solicitation of a diverse candidate pool**. This pool will represent diversity of background, race, ethnicity, gender, and other factors, ensuring quality candidates that reflect the University of Iowa community.
4. **A detailed advertising and outreach plan**, which targets the advertisement in locations likely to reach strong candidates and assures that the search profile reaches higher education leaders best able to recommend qualified potential candidates.
5. **A mid-search meeting of Drs. McDavis and McCormick and Ms. Fitzgerald** with the Search Committee to advise the Committee on best practices and to develop a rating system for candidate application evaluation.
6. **A secure, password-protected website** providing the Search Committee with access to all candidate application materials.
7. **Assistance during the interview process**, including guidance on interview techniques, providing sample questions to review and revise, planning and conducting neutral site interviews, and ensuring candidate confidentiality.
8. **Reference checks** for chosen candidates and facilitation of professional background checks on finalists.
9. **All search-related outreach and administrative services**, including communication to the Search Committee and stakeholders, solicitation and processing of applications, and management of correspondence and contact with the candidates.

## Stakeholders Involvement (RFP 5.1.6)

AGB Search anticipates that members of the Search Committee will be available for committee meetings as we assist you in defining the leadership qualities that the University seeks and conducting each phase of the search process. The Search Committee, in collaboration with AGB Search's executive search consultants, will schedule and engage in initial listening sessions with staff and community members, alumni, and campus leaders to ensure all interested parties have an opportunity to voice their ideas. Because we believe that a successful search involves an active approach, we encourage the Search Committee's participation in creating and approving the leadership profile, marketing materials, and candidate screening procedures. As the search progresses, the Search Committee will provide unbiased assessment and discussion of each potential candidate's qualifications and provide that input to AGB Search's executive search consultants. We will partner with the Search Committee as they select a group of semi-finalists and ultimately a small group of finalists to recommend to the hiring authority.

# Fees Structure (RFP 6)

| AGB SEARCH FEES   | AMOUNT           |
|---|------------------|
| Search Fee (Fixed)  | \$90,000         |
| Administrative Fees   | \$0.00           |
| <b>Total AGB Search Fees</b>  | <b>\$90,000</b>  |
| ESTIMATED SEARCH EXPENSES   | AMOUNT           |
| Travel Expenses for Consultants (airfare, lodging, transportation, meals) | \$5,000          |
| Advertising   | \$8,500          |
| Finalist Candidate Background Checks (Estimated 4 Candidates)             | \$1,500          |
| <b>Total Estimated Search Expenses</b>                                    | <b>\$15,000</b>  |
| <b>TOTAL ESTIMATED COST</b>   | <b>\$105,000</b> |

## Proposed Search Fee

To assist the University of Iowa with the search for your next President, AGB Search will charge a comprehensive flat fee of \$90,000. The search fee includes all administrative charges incurred directly by AGB Search as part of its overhead in the administration of this search (i.e., internal administration, public profile research, candidate references, printing and production, copying and supplies, postage and courier deliveries, telephone, web portal applications and digital archive, video telecommunications, and miscellaneous expenses).

AGB Search's comprehensive fee is payable in four installments. The initial installment is due within 30 days of search contract initiation. The second installment is due within 60 days of search contract initiation. The third installment is due within 90 days of contract initiation, and the fourth and final payment will be billed upon the successful candidate's appointment.

**Administrative Fees:** AGB Search does not apply administrative fees. Based on our proposed fee and common industry practices, we estimate that this waiver will save the University of Iowa \$7,000-\$11,800.

## Estimated Search Expenses

**Travel Notice:** In conjunction with the University of Iowa Search Committee, AGB Search will assess the viability and safety of travel in consideration of all Coronavirus/COVID-19 related travel warnings and restrictions.

**Consultant Travel Expense Policy:** If travel is agreed upon, all consultant travel-related expenses are billed separately on a monthly basis at actual cost. The amount of consultant travel depends on the needs of the Search Committee and the number of meetings and trips requested.

**Candidate Travel Guidance:** We advise the University of Iowa to budget an additional \$1,000 per candidate for travel expenses for in-person interviews. Candidates' expenses are covered by the University of Iowa and are not included in AGB Search's fee or direct costs.

**Advertising:** Advertising expenses are based on the needs and requests of the Search Committee and they are billed separately on a monthly basis at actual cost. The proposed advertising expenses reflect the execution of a national online campaign.

**Finalist Candidate Background Checks:** Expenses are based on an estimate of four finalist candidates. Background check expenses will be billed directly to the University of Iowa at actual cost, supported by invoices or receipts, and without administrative fees.

**Expense Adjustment:** All of the expenses included in our proposal are estimates that can be adjusted at the discretion of the Search Committee.

## Our Commitment

If the University of Iowa is unable to identify a candidate of choice for the position of President within the initial timeline (normally 4-6 months), we will continue the search process until a successful appointment is made, within one year of the initial start date of the search.

If the person selected as President leaves the position within one year from the date he or she occupies the office (i.e., is employed by or under contract with the University of Iowa), or has been terminated for any reason excepting disability, change of ownership or organizational realignment, or if the person leaves for any reason other than unforeseen circumstances such as death, illness or disability; or a change of ownership or organizational realignment; a significant change in the role or work assignment or compensation; an abusive work environment; or if there is a material misrepresentation or lack of material information of any kind by the institution, AGB Search will assist in a follow-up search provided that the re-opened search commences within three (3) months of the employment termination date.

In each of the scenarios described above, there will be no additional search fee, and only previously agreed upon out-of-pocket expenses incurred in connection with the re-opened search will be charged, such as consultant travel, advertising, background checks, and Predictive Index Assessments (if requested).

Our Commitment applies only to the search described in this agreement, and may not be applied to other searches performed by AGB Search.

# Attachment A

**ATTACHMENT A  
PROPOSAL CERTIFICATION FORM**

The undersigned certifies that to the best of her/his knowledge: (check one)

☒ There is no officer or employee of the Board of Regents who has, or whose relative has, a substantial interest in any contract award subsequent to this proposal.

☐ The names of any and all public officers or employees of the University of Iowa or the Board of Regents who have, or whose relative has, a substantial interest in any contract award subsequent to this proposal are identified by name as a part of this submittal.

The undersigned further certifies that their firm (check one) ☐ IS, or, ☒ IS NOT currently debarred, suspended, or proposed for debarment by any federal or state entity. The undersigned agrees to notify the Board of Regents of any change in this status, should one occur, until such time as an award has been made under this procurement action.

In compliance with the Request for Qualification for "Consulting Services for a Search to Identify Candidates for the new President for the University of Iowa" after carefully reviewing all the terms, conditions and requirements contained therein, the undersigned agrees to furnish such goods/services in accordance with the specifications/scope of work.

AGB Search, LLC  
(firm)

1133 20th Street, NW, Suite 300  
Washington, DC 20036-3408  
(address)

Melissa K. Trotta  
(by)

Melissa K. Trotta, Associate Managing Principal  
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