

Executive Search Services
For

President

PROPOSAL PREPARED EXCLUSIVELY FOR



THE UNIVERSITY
OF IOWA

Presented by

Anthem
— Executive

23 October 2020

Thank you for asking us to participate in the RFQ, and congratulations on the tough job of selecting between search firms that look quite similar.

Now, perhaps more than any other time, the need for a high-performing President at The University of Iowa is essential. Your next President must excel through a rapidly-changing Research 1 (R1), AAU and healthcare environment to meet the needs of a diverse student population, prepare graduates for an ever-evolving workforce, and, in the wake of a post COVID-19 environment, build more customizable and accessible working and learning pathways for faculty and students. Your President must also know the drivers necessary to effectively support and help grow UI's large health enterprise. This means your President must develop an astute understanding of your stakeholders' needs and motivations, work cross-functionally, make fast shared decisions, and adapt proactively—all while reliably producing results.

You have an incredibly wonderful AAU, R1 designated university and medical enterprise. We all know this to be true. So, I will not waste your precious time telling you what we already know - it is a great place to live and a fine institution. Rather, I will get right to how we achieve more reliable results and the reasons to partner with us.

Nothing should get in your way of having the best leader. One who values your traditions, appreciates your history and all that you have accomplished, and can lead The University of Iowa to new heights. However, higher education is rapidly changing – the leadership profile of yesterday may not be the leader for the new day. This is equally true with a search firm partner.



Like other search firms you may consider, we too have guided President/Chancellor searches on behalf of world Top 50 Universities with major health sciences components and AMC's. In such activities, we believe that our role is to act as a Sherpa on your behalf to help you reach *your* goal. We appreciate and recognize this is *your* search.

Our Co-Founder, Mike JR Wheless has studied the search industry inside and out for 34 years. He has been called “the new guru of higher education search and how it really works” by a 20-year writer for The Chronicle of Higher Education. Having studied and deeply researched the search industry, we make it a practice to, for example, ask those at Boise, Minnesota, Wisconsin,

Rutgers, Colorado, Texas, UNC, etc., for what reasons did your President/executive search fail/were you unhappy with the result?

It is within these many years of evidence-based research, patterns, and findings that we created Anthem Executive. With input from faculty, staff, students, boards, committees, and community, we built a client-first search firm.

As illustrated in the enclosed client letters of reference, we take previous disappointments and turn them around, and have taken over numerous failed search attempts and drove them to a successful conclusion. Just as Einstein insightfully phrased it, “we cannot solve our problems with the same level of thinking that created them”. We bring to traditional academic search new thinking and strategies that produce an elevated level of success, diversity, and finer candidates.

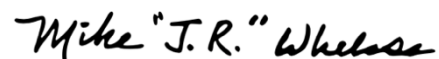
Our talent acquisition design is among the reasons our diversity placement rate for Presidents/Chancellors is 63% and our client satisfaction scores are exceptional.

We hope to roll up our sleeves and put our strategies to work in partnership with you.

if you have any questions or require additional information, please feel free to call or email me.

Mike JR Wheless

Respectfully,

A handwritten signature in black ink that reads "Mike 'J.R.' Wheless". The script is fluid and cursive.

Mike JR Wheless,
Anthem Executive, Partner & Co-Founder
(713) 581-4433
www.AnthemExecutive.com



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WHO WE ARE

Anthem Executive [formerly Wheless Search & Consulting] is a full-service search firm with a Higher Education specialty practice that relies heavily on **relationships, not overly-shopped candidate databases** to deliver talent. We recognize that colleges and universities have a unique employment environment that requires our more customized and personalized approach.

We have spent the **last three decades forging relationships** with North America's top higher education, health sciences, corporate, and non-profit executives. These close, personal relationships give us a private network reach to thousands of top professionals nationally.

Once a recruiter has tapped their database and other public resources, they are often stuck. However, where most get stopped, we are only getting started. With a handful of phone calls **we can reach the unreachable**.

As a result, our Higher Education practice has experienced unprecedented growth and success. Our team has effectively led a vast array of national searches at the Chancellor, President, Provost, Vice President (of all functioning areas), Dean and other senior administrator levels on behalf of some of the nation's largest and most successful universities—with **no failed searches**.

With our rigorous vetting process, the **candidates we place stay long term**, make an impact, and fit the culture. 98% of individuals hired in searches involving our firm have remained in their positions for a minimum of five years.

Our firm subscribes to the highest standards of integrity and principles of quality, diversity, equity, and professional and ethical practice.

A columnist, who has written about academic affairs and executive search for The Chronicle of Higher Education for over 20 years, calls Anthem Executive "the most effective search firm in higher education search today."



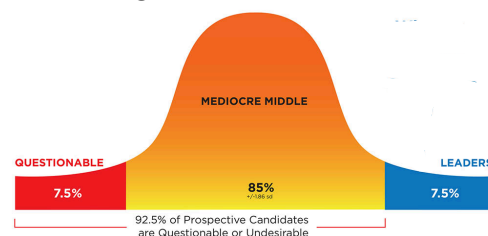
Summary

After 37 years of examining/researching the challenges of the executive search industry, and particularly the reasons president searches fail, we have established several patterns. One is that *typically*, the best candidates are found at the best performing organizations.

ID Process/Recruitment Strategy: We have conducted hundreds of academic searches, from faulty to president. There are clear distinctions in how each is recruited, as well as how each respond to recruitment overtures.

At Anthem, we use logic and statistics to drive our president candidate ID process. We place the entire university president candidate audience on a bell curve – 7.5 % of candidates are at the left side of the curve, 85% are in the middle, and 7.5% is at the right, to make up 100% of the entire candidate population.

For a president search, at the far-left side of the bell curve are **candidates with the Most Needs** (ad responders - *not always but mostly, the unhappy, unemployed, poor performers, something is wrong and/or they are unhealthy in some way, etc.). The middle of the bell curve **candidates have Some Needs** (could have many or some of the challenges of the far left of the curve). Then, to the right side of the bell curve are **candidates with No Needs at All** (they are very happy, not looking, doing great where they are, well-loved by the community and faculty, know how to raise money, and effectively champion their entire organization internally and externally and locally, regionally and nationally, etc., the Leaders). These **No Needs at All** candidates, those who operate at the top end and on the far-right side of the curve, take a lot of work to recruit. This group is a focal point of our candidate ID process and where will spend the preponderance of our time identifying and recruiting candidates for Iowa.



- **Too Many Searches:** When a firm has too many ongoing searches it may be easier to ID the middle of the bell curve candidates. See examples such as recently with Wisconsin, “the search effort produced 1 hireable candidate” who removed his name from the search and the UW Board failed the search.
- **The Repository for Who’s Looking:** Based on the bell curve analogy above, clients tell us they want to hire the best candidates with No Needs. The most well-known search firms, where you register as a potential future candidate through their website, unfortunately get a lot of the Most Needs candidates. There is no place to register on our site.

Differentiation - Look at Iowa! In a recent survey by our recent client, the American Council on Education, 50% of the president/chancellor respondents plan to step down. There are a growing number of outstanding president openings. How does Iowa’s search stand out to the best candidates who are busy effectively running their university and that get *inundated daily* with recruiting overtures? *For a president search*, relying on The Chronicle of Higher Education and other publications, or a picked-over candidate inventory and shopworn search firm database, and outdated recruiting practices simply do not work for recruiting the finest candidates. Since we concentrate our process on recruiting the “happy and not looking” and hard to get candidates of finest quality and diversity, we also have worked diligently to develop methodologies to break through the “over-overtured” noise to attract such candidates to Iowa’s search.

We have a highly effective 3-step candidate attraction process. We will not publish such information inside a publicly attained RFQ. However, are happy to discuss this and other strategies in a private conversation with the committee.

Managing Perceptions: We expect the best candidates to say, “No, I am happy where I am. I am not looking”. We at Anthem are elated when we hear these words coming from a potential candidate. As stated, we have worked diligently on our process and training to get best-of-the-best candidates from a “No” to a willing “Yes” on a client’s behalf. However, we also expect that the finest candidates will have perceptions about a client. We have implemented a client/candidate processes to effectively unwind perceptions. Many times, perceptions are just that. As a quick example, we have had numerous clients tell us that a certain leader would *never* consider their job; the same

candidate prevailed as the finalist. Effectively managing perceptions is paramount to attracting the finest.

Some major features of our proposal are the following:

- Our method to recruit a deeper pool of the finest candidates, including candidates of diversity
- The search industry is widely misunderstood; Why does it matter?
- Why do presidential searches fail? How can Iowa avoid a failure?
- Clients speak louder than we ever can; reference letters from clients
- Ensuring Iowa selects *the right candidate* for Iowa (page 15)



THE ANTHEM ADVANTAGE

There are a few things we offer that are uniquely different than other firms in the search industry—affording you

[The Anthem Executive Advantage.](#)

1. We have access to more talent.

Executive search firms have an ethical and contractual obligation not to recruit from clients. Knowing this, we employ a client **PORTFOLIO APPROACH**, in which we purposefully, in each industry sector, work with only a select few organizations to keep the number of clients we serve low. Because most other firms conduct business with so many organizations, they have significant candidate and client hands-off limitations which impact



their recruiting strategies. Candidates that are active on a search with a firm are also *off-limits* for other searches. This can equate to thousands of candidates who are unavailable to your search, severely limiting the talent pool. Instead, in each industry sector we cap the number of clients we engage with in our portfolio—vastly expanding our recruitment space and opening up access to an array of talent across the nation.

2. We have a 99% completion rate. And we do even better after other firms have failed.

By comparison, the average executive search firms' completion rate is 65 percent. By virtue of their size, number of partners/offices, and specialization, most firms can afford



to leave a search unattended and unfilled—costing clients substantial reinvestment after a search fails. In fact, we pride ourselves on our ability to bring formerly failed searches, by other firms, to successful completion, and we have done so numerous times. The inverse has never

been necessary. So, instead of picking the largest or most specialized firm on the market—Remember, bigger or more specialized isn't better; *better* is better.

3. We stay with you.

When engaging with us, you are going to deal directly with the partner and team leading your search—from start to finish. This ensures the consistency necessary for a coherent and efficient search process tailored to your needs and goals. By contrast, with other firms, you may only engage with a partner occasionally and work is delegated to less tenured associates who you have never met and who have only second-hand knowledge of your organization and its needs. This can result in candidates whose resumes match your specifications on paper but may not fit your culture or your goals, which leads to costly mis-hires.

4. We ensure personalized attention.

We work on fewer projects, and our direct and ongoing team engagement approach offers our clients extraordinary attention to detail. Using proven assessment tools, we progress monitor our search effectiveness throughout and involve candidates' spouse/family/partner for important data-gathering touchpoints. We give your search our full attention, making sure we have a close understanding of your needs and expectations to successfully deliver the right candidates for you.



Experience with AAU, R1 Research, Urban Universities

As highlighted in our Anthem Advantage, we have a deep understanding of university environments and what it takes to effectively lead an AAU, R1 university, including those with a major health sciences component and/or AMC. We bring three decades of experience.

- Baylor University
- Cleveland State University
- Duke University
- Indiana University Health
- Johns Hopkins University
- Kansas Board of Regents (multiple campus searches)

- M.D. Anderson Cancer Center
- Metropolitan State University of Denver
- Rice University
- Southern Methodist University (SMU)
- Stanford University
- State University of New York
- Texas State University
- The University of Texas Rio Grande Valley
- The University of Utah
- University of Alabama, Birmingham
- University of California, Los Angeles (UCLA)
- University of Central Florida
- University of Cincinnati
- University of Colorado
- University of Connecticut
- University of Houston
- University of Louisville
- University of Maryland
- University of Michigan
- University of Minnesota
- University of Missouri
- University of Nevada, Las Vegas
- University of New Mexico
- University of North Carolina at Charlotte
- University of North Dakota
- University of North Florida
- University of North Texas
- University of Texas
- University of Texas at San Antonio
- Vanderbilt University
- Washington University in St. Louis



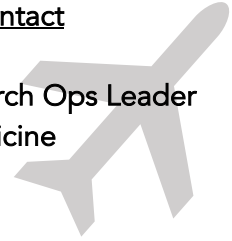
Your Anthem Executive Team

Mike JR Wheless, Co-Founder, President, Client Partner - Primary Point of Contact

Michael Ballew – Search Committee Facilitation Expert, Diversity Officer, Search Ops Leader

Florene Stawowy – Search Operations, Higher Education and Academic Medicine

Barry Conchie – President Assessor, World's #1 Executive Selection Expert



In terms of servicing a search, think of your search as a commercial flight. The reason that there are at least two, and on some transoceanic flights four, flight officers is to ensure safety and continuity throughout the journey. Any one of these aviators can fly the aircraft and land it safely. So, too, with our team. Once our search journey is underway, there will always be two, and more often than not, three or four in the cockpit. That will ensure a safe trip with minimal turbulence that gets to the destination smoothly and on time.

Who is the Firm Co-Founder and Iowa's Client Partner Point of Contact?

Mike JR Wheless did not wake up one day after another career or two and suddenly decide to become a search consultant. His family started a global search firm in the early '80s that grew to the top 1% of all firms - Mike grew up in the executive search industry.

Unlike 99% of search consultants, Mike began in the annals of executive search by conducting original candidate and organizational research that matched the client's needs. Mastering these skills, he began working for the firm's senior partners who operated searches in many different industries and sectors. In this role, he researched and cold-called candidates for recruiting assignments for nearly every kind of executive imaginable and searches around the world. This experience gave Mike a chameleon-like ability to adapt to many different client

needs, in a variety of sectors, and do what very few search consultants in the world have been able to realize.

Fast forward to today, Mike has led Board of Directors searches, CEO, and executive succession for the world's leading universities, corporations, and entities. He has served corporate giants such as UPS, Microsoft, The Home Depot and AAU's such as Vanderbilt, The University of Texas, and University of Colorado, and healthcare elites such as HCA, Indiana University Health and Johns Hopkins, and NGO's and NFP's such as The Bill & Melinda Gates Foundation, the American Council on Education, The Milken Foundation, and more. Additionally, Mike has recruited notables from inside as well as to higher education, such as Time's "Person of the Year", the head of NASA, the U.S. Secretary of State, U.S Secretary of Education, and other prominent executives.

It is important when a search consultant calls a candidate on client's behalf that the candidate responds. In a short timeframe, Mr. Wheless built the higher education practice of another nationwide search firm from nonexistent into the #1 practice of the 37-year-old firm. He also built the global Board of Directors practice and co-built a Modern Healthcare "Top 40" Healthcare practice within the same firm. He is the lone *higher education* search consultant in the search industry with such a diverse background. Since Mr. Wheless is widely known for placing higher education executives on coveted paid Boards and has led some of the largest president/chancellor searches in the country, his calls are taken.

23 years ago, Mike's first solo search was for a top 20 NIH university and academic health system. He recruited the leader from the Harvard system and as the first African American into the role. He alone led the original candidate research, candidate development, and the end-to-end search process. Since then, Mike has led hundreds of academic searches for a handful of repeat clients. As an example of his robust repeat business, Mike has a variety of clients where he has led 50, 22, and 31 assignments for the same client base. In an industry that has a "61% search success and closer rate, Mike proudly confesses that in 23 years as a senior executive search consultant he has had only 3 searches that had to be redone.

Mike JR Wheless – Bio



Mike JR Wheless has led and managed hundreds of search assignments for a variety of public and private universities and colleges, nonprofit organizations, and governmental agencies over the past 20 years. He has successfully recruited candidates for both academic and administrative positions for university systems as well as individual campuses for a variety of roles. Mike is known for his exceptional partnerships with faculty, ensuring that their voice and priorities are an integral part of the search process.

Prior to Anthem Executive, Mike was a partner with a large national search firm where he established its first higher education practice and grew it into the firm's largest sector. Mike is a Chronicle of Higher Education contributor, where he often provides insight into university-wide recruitment and search innovations.

Rare among search consultants, Mike has consulted across many industry lines. However, he found a particular passion in higher education and non-profit search. His broad experience working alongside higher education institutions and committees, coupled with his experience conducting searches for some of the world's top-performing enterprises across various industries, allows Mike to bring a cross pollination of recruitment best practices, candidate recruiting strategies, and successful search tactics to best serve his clients.

Mike has conducted over 1000 executive search assignments, including working with and recruiting some of the nation's most influential leadership, such as Time's Person of Year, the head of NASA, and the Secretary of Defense.

Mike has recruited talent from universities across the country including Harvard, MIT, Purdue, Duke, Georgia Tech, Penn, Boston University, Florida State, Arizona State, Michigan State, and more.

Mike has searched for talent and consulted with the American Council on Education, Duke University, Cleveland State University, University of Colorado, Texas Tech University, Pennsylvania State System of Higher Education, The University of Texas, Barnes Jewish Hospital, M.D. Anderson Cancer Center, Payne Institute for Public Policy, Jewish Federation of Greater LA, The Omaha Zoo, The Center of Advancing the American Dream in Washington DC, The Milken Institute, Austin College, Children's Hospital of Philadelphia, The Bill & Melinda Gates Foundation, UT Southwestern, Texas A&M University, Southern Methodist University (SMU) and more. Mike has also assisted Fluor Corporation, Microsoft Corporation, DXC Technology, Blue Cross Blue Shield, United Parcel Services (UPS), BBVA Compass Bank, The Home Depot, The Gallup Organization Inc., and others with Board of Director and executive hiring decisions.

Prior to his career in consultancy, Mike served our country in the United States Air Force – Space Command Division. Mike is on the Board of Trustees of an education institution and also gives back his time on a foundation Board of Directors.

There is Choosing a Leader. Then There is Choosing the Right Leader for Iowa

Have you ever hired a person into a new role or promotion, and they did not work out? You just knew this person would have been perfect for the role and culture. It would have been exceedingly helpful to have known this beforehand.

Whether it shows up in year 1, in 2 years, or 3 years, the data is explicit, a mis-hire at the university CEO level can cost millions of dollars.

For our President search clients, we offer, included in the fee, independent and unbiased candidate assessments by the world's foremost leader in the field. To further ensure a client hires the right candidate, this unbiased and independent assessment is layered on top of our firm's *candidate self-assessment matched to client needs tool*, and *reference checking congruency tool*.

Barry Conchie spent his life's work putting science to a prediction of executive function. He has been called "the father of executive assessments". His assessment methodologies and results go far beyond that of personality assessments and the likes of a Hogan and other similar assessments.

Barry has amassed an assessment database of 60,000 executives and measures candidates against the top quartile of all performers. Barry will deliver the assessment findings directly to the Board for their final deliberations and decision on the candidate of choice. This service also supports clients in making the right choice among candidates and informs vital onboarding and development decisions.

"When I ask any candidate what he/she is best at, by far the number one answer I hear is, 'Strategy'. However, of all the executive functions we assess, Strategy shows up the least."

- Barry Conchie

Barry Conchie – President Assessment and World's #1 Executive Selection Expert



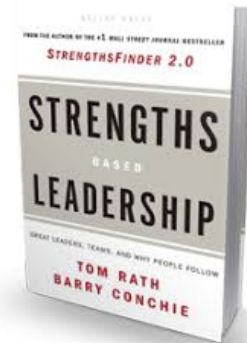
Consistently ranked as one of the "top 50 Leadership Thinkers in the world", Barry Conchie is the Senior Scientist who developed the science behind Gallup's StrengthsFinder program.

Barry Conchie is Founder and President of Conchie Associates LLC and has more than 30 years of experience in the areas of psychometric assessment,

executive coaching, top-level succession planning, individual and team optimization, organizational effectiveness and strategic alignment.

Born and educated in the UK, Barry is a globally recognized expert in individual and team effectiveness. He has helped organizations select top performing executives, has consulted in the areas of executive selection and succession planning and facilitated the formulation and strategic alignment with some of the world's leading organizations.

Previously, Barry served as a Senior Scientist with The Gallup Organization's Global Leadership Research and Development division. His current research is in the science of decision making, heuristics and cognitive bias.



Barry is the co-author of The New York Times and Wall Street Journal best-seller, *"Strengths Based Leadership,"* and has been a long-time contributor to magazines, newspapers, business journals and media programs throughout the world.

An Expertly Led Search Committee



From News Article: Michael Ballew, an expert facilitator with Anthem Executive, writes down feedback during a public forum. It was one of more than fifteen pages of notes about the qualities of the university's next President taken during the faculty forum. Throughout the process, each page was hung on the wall for all to review, study and further comment. It was a fully interactive and a most helpful exercise for all involved.

We understand the close working relationship we must have with your search committee. We must earn their trust through clear communication, superior organization, and by listening effectively. We also understand that within academic institutions and systems there may be barriers to a smooth selection process, including political alliances, affiliations and agendas that must be managed effectively for the institution to experience a successful search and an outstanding hire. Setting proper expectations and effectively managing large, complex, diverse search committees to align together on a major hiring decision requires skill, expertise and finesse – areas in which our expert team member Michael Ballew excels.

Anthem Executive provides search process and candidate assessment tools and resources that effectively focus the search committee members on the task at hand, and not on

political distractions. Clients do not expect search partners to rely on intuition, but to put candidates through their paces, push them against the core competencies of the role, assess their fit with the organization and reveal the true nature of the person behind the CV. Our team is effective in doing just that.

We are also excellent with large committees, especially those with varying and diverse viewpoints. We welcome and fully encourage diversity of thought and the inclusion of all voices. The typical committee size we work with is from 15 to 25, and these members work closely with us from start to finish. First time clients consistently tell us we have the best tools and run the smoothest committee meetings they have seen. Our repeat business (the majority of our business comes from repeat clients) is a strong indicator of our search client/partner satisfaction.

Professional search committee facilitator, Michael Ballew, of Native American heritage trained in employment law, diversity awareness and a former corporate EEO/Diversity officer, ensures sensitivities and fairness in the review and assessment of a candidate's qualifications. Michael is an expert in workplace diversity and inclusion, as well as unconscious bias avoidance. Additionally, Michael is a trained industrial / organizational psychologist and an authority on search committee facilitation. Michael has facilitated hundreds of search committees and public forums to successful conclusions. Michael, and the entire Anthem Executive search team, will provide and ensure the same success for the search committee.

Michael Ballew - Co-Founder, Chief Administrative and Diversity Officer, National Academic Search Practice



Native American by heritage, Michael Ballew has served clients in the executive search industry for over 14 years and served as recruiting executive in corporate America for almost two decades prior. During his corporate years, Michael served as a client of over 120 executive search firms with an array of practices. Because of his diverse experience, Michael brings a perspective to executive search that is extremely unique to the industry. Michael has incorporated - and in many cases improved on - the best of the best practices. Known for his abilities as a skilled leader and facilitator, our clients appreciate Michael's hands-on approach, active partnership, and intuitive leadership throughout the search process. Clients (and search committees) regularly comment that the methodology he utilizes, and his facilitation is the "best we have ever experienced." Most importantly, Michael is a keen listener and incorporates the interests of clients in each search plan and process.

Michael has facilitated hundreds of search committees. He brings vast experience and a unique set of skills and attributes. An Industrial Psychologist by training, he focuses on the details—

from the needs of the organization to the varying personalities of the stakeholders involved in the hiring decision. His customization of each search experience is paramount to bringing about positive outcomes for the client and search committee and a positive experience for the candidate. Michael is gifted with the ability to bring even the most divided committees to consensus.

A former diversity officer, Michael leads the firm's diversity and inclusion efforts and is committed to bringing clients a diverse slate of qualified candidates. He has facilitated initiatives for AAU's Research 1's, public and private universities, land grant institutions, historically black colleges and universities, minority-serving institutions, and urban-identifying universities/colleges with robust schools of medicine and academic health sciences components.

Prior to his work in the executive search industry, Michael spent 20+ years in senior-level management with expertise in recruiting, counseling, training, operations, facilitation, project management and workplace diversity. He excels at evaluating, managing and motivating fellow executives. Combined with a passion for a positive client and candidate experience, Michael is tangible advantage and asset to client organizations. With a strong focus on customer service, quality, and search management and facilitation, Michael brings an exemplary track record of 99% success in search engagements.

Michael holds a Bachelor's in Psychology and English with a minor in Music and a terminal Master's Degree in Industrial and Organizational Psychology.

Operations, Research and Recruitment Support

Florene Stawowy – Senior Client Service Partner, Higher Education and Academic Medicine



Florene has been in executive search for over 20 years. She has worked with our consultants for more than 15 years and is a core member of the higher education and academic health practice. Over the last two decades, Florene has developed deep expertise in senior-level search, having been charged with numerous executive leadership transitions with a particular emphasis on higher education and academic health search.

Florene has served clients across the United States and internationally. Her experience spans throughout Association of American Universities and public research universities, regional and state colleges, private liberal arts institutions, and health sciences organizations. Her search

work encompasses the entire span of leadership in higher education and health sciences from chancellor, president, provost, vice chancellors, EVP/SVP/VP's, deans, to many other roles such as CEO, COO, CNO, CFO.

Florene ensures the highest quality service to clients while seamlessly directing search assignments. Florene possess a keen eye for talent and keeps her pulse on the national talent pool. Florene is passionate about connecting hiring organizations with underrepresented minority and female executive talent.

Other Team Members

Others involved behind the scenes will include our team of administrative and operations professionals, researchers, and various trusted advisors with extensive experience in higher education and Provost search and selection.

Dr. John Rudley, Executive Advisor - Higher Education Practice

Leyla Kayi, Research and Search Operations, Higher Education and Academic Medicine

Sarah Meffert, Research & Search Operations - Higher Education and Academic Medicine

Scott Watson, Co-Founder EVP and Corporate Officer

Dr. John Rudley – Executive Advisor - Higher Education Practice



Dr. Rudley served as Chancellor of the University of Houston System and President of the University of Houston, Texas' premier public metropolitan R1 research and teaching institution. He also served six years at that institution as vice chancellor/vice president for administration and finance.

Dr. John M. Rudley is the former President of Texas Southern University (TSU), one of the largest public Historically Black College and University (HBCU) in the nation, which is located in Houston, Texas, the third largest metropolitan region in the country. During Dr. Rudley's nearly eight-year tenure as President of Texas Southern University, he has instituted substantive and far-reaching changes via administrative, academic, student and outreach initiatives.

Dr. Rudley has held numerous leadership positions in higher education, including Vice Chancellor for Business and Finance at the Tennessee Board of Regents. As Vice Chancellor, he promoted the effective and efficient financial operation of 46 institutions consisting of 6

universities, 14 community colleges and 26 vocational-technology centers that served 185,500 students with a consolidated annual budget of \$1.4 billion.

He also served with distinction at the highest level of education in the nation when he served as Special Assistant to the Secretary of the U.S. Department of Education, Secretary Lamar Alexander, in responding to the requirements of the Chief Financial Officer Act of 1990. Recommendations for organizational changes were developed, including the creation of an accounting and financial management services division and the completion of the first auditable financial report (in conjunction with the General Accounting Office) for the U.S. Department of Education, as well as plans for the consolidation of the Budget Formulation, Budget Execution and the Financial Management Services of the Department.

Earlier in his career, Dr. Rudley held administration and finance related positions in both Tennessee and Texas. He acquired his public accounting experience from Coopers and Lybrand in Los Angeles and Seattle.

Dr. Rudley is a licensed Certified Public Accountant. He received his Bachelor of Business Administration degree from the University of Toledo. He received his M.Ed. in Administration and Supervision and his Ed.D. in Administration from Tennessee State University.

Leyla Kayi – Research and Search Operations, Higher Education



Originally from Michigan, Leyla Kayi focuses on research and identifying top talent in higher education and academic medicine. Her diverse background spans marketing communications, public relations, fundraising and educational administration. Having worked for small agencies, large international corporations and public and private colleges and universities, Leyla understands the complexities of finding the best candidate who is not only a good fit but also meets the demands of multiple stakeholders.

Leyla received her B.A. in communication and her M.A. in higher education administration, both from Michigan State University. She is a die-hard Spartan fan who also enjoys spending time with her puppy Spartie. When time permits, Leyla also enjoys traveling. She has had the privilege to experience the cultures of Kazakhstan, Turkey, and many other countries. She is happiest being on, in or surrounded by water.

Scott Watson - Co-Founder EVP and Corporate Officer



Originally from Canada, Scott Watson has served clients in the executive search industry for over 30 years and holds a BA in Psychology from California State University Sacramento. Known for his candor and clarity of focus, our clients appreciate Scott's insights and sense of humor along with his resolute attention to search success. Scott is highly organized and ensures ongoing, clear communication with all search committee members.

A key indicator of success with any search is repeat business – how many times you are invited back to lead engagements for the same client. Scott has multiple clients for whom he has led over 20 unique searches over a three-year period for the same client. He has facilitated search initiatives for commissions, research institutions, and institutions of higher education, including health science centers, academic medical centers, and government recruits. Most notably, his higher education results feedback is often cited as 'exceeds expectations' by administrators and faculty alike.

Scott has completed successful searches for executive roles, such as Commissioners, University System Chancellor/President, University President/Chancellor, Provost, Vice Provost, Dean, Chair, Diversity & Inclusion Officer, Chief Business Officer, External Affairs, Chief of Staff, Academic Strategic Planning, Communications and Marketing, and more.

Over the course of his 34-year career, Scott has a stellar track record, with a 99% search completion rate, delivering highly-productive and long-lasting candidates for our clients.

Sarah Meffert – Research & Search Operations - Higher Education and Academic Medicine



Sarah Meffert brings an extensive background in customer service, research and work-flow, allowing her to combine both interpersonal and analytical skills to coordinate the delivery of successful searches from beginning to end. Sarah's strengths in communication, customer service, and project management serve to ensure positive outcomes and an outstanding experience to our clients and candidates.

Prior to joining the Anthem Executive, Sarah was a recognized industry leader in natural history travel sales and customer service. She assumed the initiative of reformatting the first successful multi-dimensional natural history educational workshop held in the Peruvian Amazon to a student format and personally guided the first two of these groundbreaking programs to the

rainforest. This program has expanded to ongoing travel by high schools and colleges throughout the U.S. with similar models adapted for numerous countries abroad.



What Others Say About Us

"My role requires that I sit on many search committees. Michael Ballew leads the best search committee facilitation I have seen. We have used the Anthem team repeatedly with outstanding results. They are fun too."

- **Blake Flanders, PhD – President, Kanas Board of Regents (SHEEO)**

"If you are looking for a search firm who can deliver unusually high quality, I suggest you hire Anthem."

- **Julie Freischlag, MD - Vice Chancellor for Human Health Sciences and Dean of the School of Medicine at UC Davis**

"I and other stakeholders worried that the highly publicized conflict in the university might make it difficult to attract candidates for the chancellor position. But I was pleasantly surprised by the caliber of candidates provided by Mike Wheless and Wheless Search [now Anthem], the national search firm selected to assist the board."

- **R. Steven Hicks, Vice Chairman Board of Regents, The University of Texas (excerpt from Austin American-Statesman article)**

"If you are a committee or search chair looking for a great president search partner, I positively recommend Anthem and Mike Wheless. Mike's ability to recruit hard to get candidates and his vantage point from working in so many different industries sets him apart from the more narrowly focused recruiters. He can get to any candidate, has a fantastic network and delivers results."

- **Larry K. Anders, former Chair and Board of Regent, Texas Tech University System**



References

PHONE NUMBERS FOR REFERENCES WITHIN LETTERS

Nevada System of Higher Education

System Administration
4300 South Maryland Parkway
Las Vegas, NV 89119-7530
Phone: 702-889-8426
Fax: 702-889-8492



System Administration
2601 Enterprise Road
Reno, NV 89512-1666
Phone: 775-784-4901
Fax: 775-784-1127

Mark Braun
Executive Director
Board of Regents, State of Iowa

Mark:

As a fellow state higher education system leader, I thought I would share with you some recent experiences.

I understand you have opportunities forthcoming, such as the president search for the University of Iowa. Anthem Executive mentioned to me they are interested in partnering with you.

The Nevada System of Higher Education (NSHE) recently concluded a series of president and executive searches. I was able to see different search firms in action. One firm stood out to me, Anthem Executive. They do a fantastic job with students, faculty, staff, community, and board members. Even through Covid-19 – they delivered and then some. Anthem has now handled a series of president searches for us, including for UNLV our flagship R1 and health sciences campus. And each of their president placements were candidates of diversity.

Anthem shared with me they have recently become a preapproved vendor with the Big 10. Mark, I highly recommend them - Anthem will not disappoint. Scott Watson and Mike JR Wheless of Anthem have a unique approach for attracting better talent, particularly diversity.

I believe Mike JR Wheless reached out to you directly to express interest in a partnership. Know that they are selective and don't reach out to every institution. I will let them share the reasons – it's compelling.

I have recently stepped down as Chancellor; however, the Board of Regents asked me to extend my contract through December to assist with the transition. I would be glad to discuss further.

Best regards,

Thom Reilly
702-427-4457

University of Nevada, Las Vegas • University of Nevada, Reno • Nevada State College • Desert Research Institute
College of Southern Nevada • Great Basin College • Truckee Meadows Community College • Western Nevada College



University of Colorado

Boulder | Colorado Springs | Denver | Anschutz Medical Campus

University of Colorado System
Board of Regents

September 2, 2020

To Whom It May Concern,

The University of Colorado System serves 67,000 students, employees 35,000, garners over a billion dollars in research annually, is an AAU member institution and a "top 50 university in the world". CU also has a thriving and complex medical campus. We had an extremely popular and successful leader who had been in place for many years that had just stepped down. As Chair of the Board of Regents, our board and I knew we needed to hire an excellent consulting firm. We had experienced some firms not performing to our standard. Consequently, getting the firm selection right was paramount.

Roughly two years prior, we had hired Anthem Executive to lead our Board of Regents retreat to develop or system strategy. Our board was very pleased with the quality of the deliverables by Anthem and Mike Wheless. So, we included Anthem in the firms we interviewed to partner with to replace our retiring system president. We decided to hire Anthem and I am so glad we did on many levels.

Anthem is adept at navigating a politically charged board which is one of the few publicly elected boards in the country. Our state has stringent open meetings laws and the Anthem team was very experienced with that setting. The co-search chairs, both board members, reported to the board along the way. We had an exceptionally large search committee and Anthem's committee facilitation skills, tools and technology were first-class. Anthem ensured all voices were heard and valued. The way they led the committee and our board, all with very different views and political leanings, was truly remarkable.

Our University and Board was seeking a new leader who brought higher education, government and business experience. We knew having a leader with winning experience in two of these areas would be rare. And having all three would be the proverbial needle in a haystack. Anthem rolled up their sleeves and did real recruiting. They produced an exceptional slate of talented and diverse candidates. It would have been difficult for us to have gone wrong with any of the candidates. Additionally, they found the "unicorn" we sought who brought experience in government, higher education and business.

If you seek a search (or board consulting) firm, who is an excellent partner that will repeatedly produce exquisite outcomes, I would recommend developing a relationship with this firm.

Sue Sharkey, Regent - Phone: 970-420-6479
University of Colorado System

NM STATE

New Mexico State University System

January 11, 2020

As Vice Chair of the New Mexico State University System Board of Directors, we recently successfully concluded our system strategy redesign and search for system Chancellor. I recall feeling the weight of finding the right direction and person to lead our institution during a time when higher education itself is experiencing a great deal of change. We used Anthem Executive (formerly the Wheless firm) for consulting and our search; and I have to tell you we are so pleased with them that I was immediately compelled to share our experience with you.

In our system, the system Chancellor and flagship campus President are combined into a single position. We selected Anthem Executive to partner with us with our system planning and this system Chancellor/President search. We were in a situation where we needed to replace a popular leader - no easy task, to be sure. There were so many complexities involved in this engagement, including government involvement with the search. Anthem worked many long nights and weekends with us thinking and strategizing throughout the entire process. This firm's true dedication to our success is impressive. Some consulting firms talk about being our partner; Anthem actually lived it.

The candidate pool Anthem recruited was so on target for our needs that we could have hired any of the five finalist candidates. This was not just my opinion, we received over 200 comments from our stakeholders who said the same thing and repeatedly complimented the quality of the Anthem team and candidates.

Anthem collaborated with our board to think through splitting the position into two distinct roles: system Chancellor and flagship campus President. It was a tall order to get our two top candidates to agree to this new structure, particularly since each went through the search process believing the role would be a combined position. In the middle of working through this new scenario with Anthem, a major issue arose with the leader we wanted to appoint as President. The candidate received a substantial offer while we were in the process. Anthem worked tirelessly and effectively through this minefield with finesse and secured agreements from both candidates. Even with a compressed time frame, Anthem enabled us to hire a flagship campus President and a system Chancellor from this one search. Anthem literally made history two ways with us in the state of New Mexico. Not only did we split the role with two exceptional hires, Anthem also recruited the first Hispanic to lead our system.

Anthem has now led multiple searches for the system and flagship campus. They just completed the System CFO and flagship Provost searches, and both were gender diverse hires.

Many consulting firms have former higher education leaders in their practice. We chose Anthem because their higher education team has nationally recognized former higher education execs, who have made well-documented, positive impacts on their former institutions. You can't put a price on this kind of guidance. Guidance we drew on often. In our initial conversations it was evident we were in highly competent and capable hands.

Additionally, Anthem has stayed on to help with the onboarding process, as well as ongoing support. Some firms believe that once the search is over, their work is done. Anthem's philosophy is to provide the candidate, our system, and board with long-term support by highly successful higher education leaders. Anthem has not only worked with us to get us to an incredible outcome on the search(es)... they have brought expertise and insight to the system on enrollment management, retention, institutional operating efficiencies, cost savings and other strategies. In fact, we hired their consulting arm for ongoing support in these key areas vital to our System's future.

If you want a search and consulting firm that will surpass your expectations, I would encourage you to strongly consider building a relationship with Mike Wheless and his firm. As you well know, mediocrity or failure can put an organization years behind. Great results, however, set an organization on a positive path. And that is where we are now as a result of our partnership with Anthem.

If I can provide any additional insights I would be more than happy to do so.

Respectfully,
Kari Mitchell
Vice Chair of the Board of Regents - NMSU

Kari Mitchell, CEO, Las Cruces Machine
6000 S. Main St., Ste. B | Mesilla Park, NM 88047 | 575-526-1411 phone |
kmitchell@lascrucesmachine.com





February 26, 2020

I am chair of the Board of Governors of Pennsylvania's State System of Higher Education (PASSHE). PASSHE, like many state public higher education systems, experiences enrollment and financial challenges related to declining cohort population and reduced state allocation. Our board nevertheless knew we had to set the right course for the System and attract good talent-and the right person to the top job of System Chancellor. We had to do this well, starting with selecting the right consulting firm.

We chose Anthem Executive (formerly Wheless Search & Consulting). They have a business model that differs significantly from other consulting firms. We are glad we made this choice and are very pleased with the outcome. The candidate pool was so diverse that it made our search committee and our board really think through the attributes of leadership we needed at the time. Anthem brought us a talent pool so strong that it made the selection of our next chief executive very difficult. This is one of the many compliments about Anthem from one of our committee/board members:

"I want to compliment Anthem and your co-workers for the quality of guidance, counsel and candidates you have brought to us. But more importantly, given our needs, I appreciate the various backgrounds and personalities that you have presented us. It has made our choice more challenging."

A search firm is an extension of your organization and should represent you well. Even our candidates who did not win the role commented on Anthem – "I was very impressed with all of the Anthem staff and the entire process from the moment they contacted me through all of our interactions. I am regularly contacted by search firms, and find many to be impersonal, using tired and cliched methods, that turnoff rather than encourage candidates. The Anthem team was different. They were supportive, professional, and most importantly, provided expert and personalized advice and encouragement. I believe this personal touch is not a common feature of most search firms. I have had recruiters call me about opportunities, and drone like robots while reading from scripts; not sure how anyone gets excited about a job and organization that way! I wanted to make sure and let you know that Anthem gets an A+ for superior performance! Again, everyone at Anthem was pleasant and helpful, EVERYONE. Please share my appreciation with the Anthem team."

Our System Chancellor is doing outstanding. I thank Anthem Executive.

*Cindy Shapira
Board Chair - Pennsylvania State System of Higher Education
Vice Chair, Jewish Federations of North America
Cell Phone: 412-523-377*

UNT SYSTEM

April 12th, 2020

We have been going through a complete system and university transformation and Anthem (formerly Wheless) has now completed 20 plus consulting and search assignments for our university over the past 4 ½ years.

I am the Board Chairman of the University of North Texas System and writing you on behalf of our System board. We needed a firm who could advise us on System strategy. We then had to canvas the entire national marketplace to recruit a diversity of candidates to fit the strategy.

Our Board required a System Chancellor who could move our university to its next level of significance and accomplishment. We took a look at Anthem for strategy and the search and knew they had successfully led the last two System Chancellor searches in our state for both the University of Texas System and Texas Tech University System. Our due diligence indicated they did an outstanding job for each board. What also impressed me, Anthem led both assignments, located in the same state, for two competing universities... simultaneously. Both universities hired excellent leaders and neither search suffered.

Anthem has an outstanding national network and their processes and assessment tools are the best I have seen. The candidate pool was highly diverse, ethnically and in gender, as well as diverse in the sense of candidates from around the country. I have been on the board for many years and through multiple executive searches. Anthem delivered the deepest pool of candidates that I have ever seen.

Anthem got us a star as our System Chancellor. Our Chancellor has been in place for over a year and, wow, has she delivered. She possesses the strengths, abilities, character, and skills, and done exactly what we asked Anthem to find in our next leader.

It is worth noting too that, initially, our Chancellor had told Anthem she was not interested in the UNT System. After she said "no," Anthem and Mike Wheless artfully turned her on to our university and got her to a willing, and enthusiastic "yes."

Anthem even took over a search where another search firm had failed and brought the same search to a successful conclusion. They also just completed our CFO search for the System and did such a great job I asked them if they would be interested in my corporation's CFO search.

I have worked with many consulting firms. . . even fired some for non-performance. All firms are not equal. I can't say enough about Anthem's search, consulting and candidate assessment ability, and true partnership. Hire them. You will not be disappointed.

Regards,

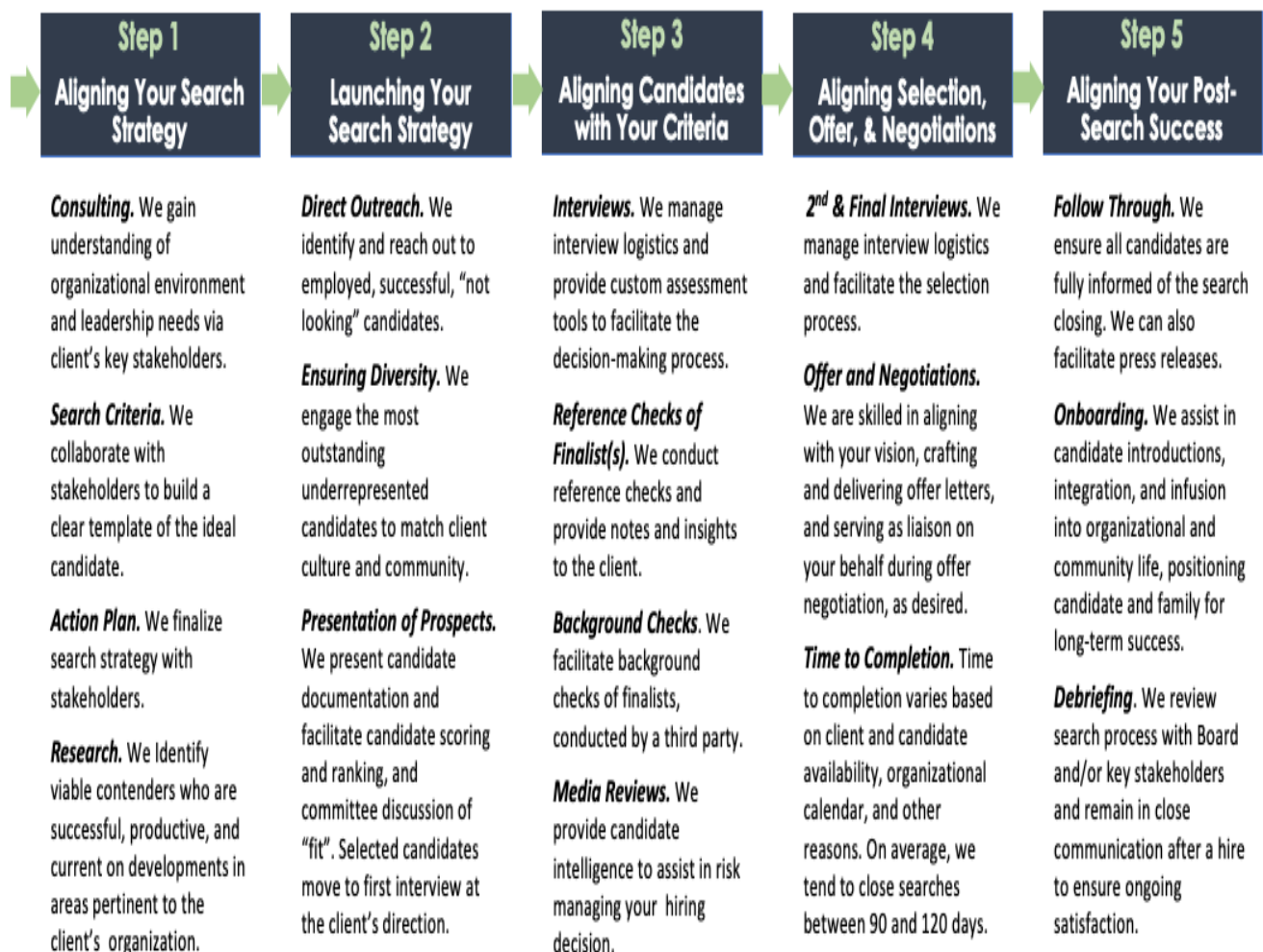


G. Brint Ryan
Board Chairman, University of North Texas
Chairman and CEO, Ryan, LLC
Phone: 972-567-4495



Our 5-Step Search Process

We utilize a proven 5-step process to conduct your search. Step details are outlined below, and they evidence years of refinement, offering you our most thorough and efficient process to build the most optimal, diverse pool of candidates. No matter your role needs or search complexity, we guarantee the full range of work detailed within in each step—providing you a most organized and comprehensive search from start to finish.





Schedule/Time Commitment

SCOPE OF WORK

SAMPLE SEARCH WORK PLAN

(** Indicates Committee Time Commitment)

Search Definition & Preliminary Planning – Week 1

- Preliminary meeting to gain background information
- Determine needs for stakeholder and campus forums/surveys
- Preliminary strategic planning for sourcing and search timeline

** Search Launch with Search Committee – Week 2

- Review Search Resolution Plan and Timeline. Schedule dates for future meetings
- Input regarding position, organization, community, desired professional experience, skills, abilities, personal traits sought, culture, challenges, problems to solve, opportunities, what does the new leader's success look like?
- Provide search map and "best practices" for a successful outcome (helpful for first-time President search committee members)
- Confidentiality, diversity, inclusion and equity training. Sunshine law training. Online candidate review portal training. (All done by our inhouse expert in concert with HR/Legal)

Creation, Approval, and Implementation of Search Documents - Week 3

- Draft Search Materials, including Ad, Search Criteria, and develop Candidate Self-Assessment Matched to Clients Needs tool
- Review and Approval of Materials

Sourcing of National Candidate Audience - Ongoing

- Conduct original research to client's specific needs
- Identify leaders in organizations of similar size and complexity
- Customized direct outreach to targeted candidates
- Screen/interview candidates for fit and seek references

Evaluation of Prospective Candidates by firm - Ongoing

- Evaluate candidates' background, skill, and intangibles (second and third interviews with firm)
- Ask serious contenders to complete Candidate Self-Assessment Matched to Clients Needs tool

Candidate Documentation Provided to Search Committee for Evaluation - Week 8 *(provided in advance of committee meeting to discuss and select candidates for first round interviews)*

- Present candidate information (Cover Letter, Resume/CV, Candidate Self-Assessment Matched to Client's Needs tool, and pertinent supporting documentation)
- Provide candidate assessment tool to committee to facilitate candidate evaluation/selection process (Provided by firm inhouse expert in order to help committee make the paper cut in selecting first round interviewees)

**** Committee Meeting: Select Candidates for First Round Interviews – Week 9**

- Discuss and select candidates, dates and location for first round interviews
- Develop first round behavioral based candidate interview questions in conjuncture with the committee and firm expert/IO phycologist
- Provide Search Committee with suggested format for facilitating constructive first round interviews

**** Initial / First Round Interviews with Search Committee – Week 11**

(Since our firm's unique process provides the committee at paper cut stage with insightful interviews from the committee's questions/candidate's direct answers to these questions, prior to meeting of candidates, we suggest video interviews at this stage)

- Distribute interview itinerary
- Implement interview format and candidate evaluation/grading platform
- Debrief interviews with committee by firm expert I/O psychologist
- Committee selects candidates for recommendation to hiring authority for on-site interviews
- Firm debriefs Candidates

Second Round Interviews with Spouse/Partner/Family Accompanying - [Week 13](#)

- Develop and distribute interview itinerary
- Request and Review Family/Spouse/Partner Summary and survey information
- Conclude reference checks, background investigations
- Debrief second interviews: Institution's Stakeholders, Candidate, Spouse/Partner/Family members
- Client selects candidates for Final Interview
- Administer candidate assessment conducted by the world's top expert in the field

Final Interviews – [Week 14/15](#)

- Develop final round behavioral based candidate interview questions in conjuncture with the hiring authority and firm expert/IO psychologist
- Provide hiring authority with suggested format for facilitating constructive final interviews
- Debrief final interviews: Stakeholders, Candidate
- Assessment expert provides findings on finalist to hiring authority; provides feedback on how to best work with each finalist candidate's DNA to ensure success
- Client makes selection decision
- Notify selected candidate
- Develop offer

Search Finalized – [Week 16/17](#)

- Extend offer
- Facilitate closing and negotiation efforts in conjunction and coordination with the client
- Candidate accepts, establish agreed start date
- Communicate hiring decision to all candidates thanking each for their participation in the search to maintain positive relations on behalf of the institution and its stakeholders
- Internal announcements and public announcements and press releases
- Follow-through with candidate/spouse/partner/family (by firm) to ensure “fit” and infusion into the community and a smooth transition for the newly hired executive
- Follow-up with client to gather feedback and ensure committee work satisfaction

Candidate Starts – [Week 16/17](#)

- Follow-through with candidate/spouse/partner (by firm) to ensure “fit” and infusion into the community and a smooth transition for the newly hired executive
 - Follow-up with client to provide/gather feedback; ensure client satisfaction
 - Follow-up calendared with client and candidate
-



Stakeholders Involvement

The more information we have, the better the result. Alignment and expectations must be set. The only way to do this the right way is to listen to what is being said and not said.

It is amazing to us how many times a superb candidate latches on to something a Stakeholder almost did not share with us. Many times, it is the items taken for granted, from being in the day-to-day, that grabs a stellar candidate's attention.

For this reason, we believe all should be able to participate and have built platforms to allow for such. Our rationale is simple – elimination of any person's ability to say that he/she did not have an opportunity for input. It is everyone's search, the committees to conduct and lead, and our job to serve as Sherpa.

We accomplish this with:

- Forums by video or in-person (since our process has a long come with an insightful candidate pre-interview tool and step built into it, we have been conducting video well before it became a norm. We are doing entire forums online, if needed)
 - Forums: faculty, staff, students, community, academic affairs, administration, medical
- Online surveys
- A marketing plan and search update plan; done with your marketing department and the search chair (take the guesswork out of any stakeholder's mind about where the search is and at what stage)
- Since the medical component is a major consideration, we suggest an audience with the key stakeholders and their groups



Schedule of Fees

- **Professional Fee:** Our professional fee is structured as a retained search agreement, set at the industry standard professional fee for retained executive search services of 33% of first year compensation. For the University of Iowa President search, we are offering a flat fee of \$100,000. This includes assessments conducted by Barry Conchie for 3 finalists.
- **Indirect Expenses/Engagement Support Fee:** In order to cover other more difficult-to-track expenses such as initial background checks, postage and internal telephone, photocopying, and basic report production, direct mailings and associated mailer development, correspondence, transcription services, courier, express/overnight mail delivery, report reproduction, outside printing, supplies, candidate development/outbound direct advertising and external database research, research materials and directories, phone, video, and telecommunications, we charge an Indirect Expenses/Engagement Support fee of \$15K.
- **Advertising Costs:** Advertising costs vary depending on the size of the ad, the number of publications, the use of online postings, and the number of times the ad appears in each publication. All costs associated with advertising the position will be the responsibility of the client, however we will assist in developing and placing the advertisements. We have a negotiated rate \$500.
- **Consultant Travel Expenses:** Clients are billed for expenses associated with on-site Client visits by Consultant(s) to include initial survey visit, on-site presentation of candidates and other visits as requested by the Client.
- **Candidate Interviewing Expenses:** Candidate Interviewing Expenses (such as travel and living expenses to and from interviews) are reimbursable to the Candidate by the Client.
- **Background Investigations Check Expenses:** Expenses for 3rd- party background checks are reimbursable to Anthem Executive. This is a pass-through expense.
- **Assignment Cancellation:** You have the right to cancel this assignment at any time. If you decide to cancel the search you will only be financially obligated to pay the accrued fees and expenses as of the cancellation date. The only exception is that a cancellation during the first

month of the search incurs an obligation of one installment of both the professional fee and engagement support fee plus all accrued out-of-pocket expenses.

■ **Performance Based / Milestone Invoicing:** Our professional fee is billed in three installments and each installment will be tied to the completion of the following key milestones: (1) upon initiation of the search; (2) the presentation of initial slate of candidates; and (3) the identification of the semi-finalist slate. Invoices are due and payable upon receipt. Our fees and expenses are not contingent upon our success in placing a candidate with your organization. Interim fee payments are not refundable, but are credited toward the total fee due. Once the fee has been fully invoiced, no further professional fee will be billed until the assignment has been concluded. However, out-of-pocket expenses will continue to be billed on a monthly basis.

■ **Guarantee (more than the usual and customary):** If a candidate we place leaves your employ within twenty-four (24) months of his/her start date, we will reinitiate, save for expenses only, a search for the same position and level as the original placement provided that: (1) the placement's departure is for cause, or the result of his or her inability to perform responsibilities or (2) the placement resigns, unless the focus of the job has changed such that the responsibilities or authority of the position are significantly different than represented at time of hiring. Your institution is entitled to one replacement search and the search must be initiated within six months following the departure of the original placement. If client is not current on payment of invoices issued by Anthem Executive, this guarantee is void.

■ **Incomplete or Failed Search:** It is our experience that clients have a difficult time narrowing down to a single candidate from our exceptional and well-qualified candidate pools. In fact, we have had clients make multiple hires from a pool to fill additional positions because of the high-quality candidates we present.

However, in the unlikely event that a candidate cannot be selected from our initial pool of candidates, we would continue our efforts and maintain open communication and updates until the search is successfully completed to UI's satisfaction. No additional professional fee would be incurred, save expenses to continue the search.



Commitment to Diversity

63% of our searches result in diversity hires.

It's difficult to deliver a diverse candidate slate of qualified people. However, we do. Simply including candidates from various underrepresented groups to "hit" a number is a disingenuous and unfair practice in which we do not participate. It's unfair to you *and* to the candidate(s) to include those who have little to no chance at being viewed as viable for the role just to be able to say... "we provided a diverse slate." The way we ensure a diverse candidate mix is to be intentional about targeting diversity candidates who have had successes in their previous and current roles and who do fit the phenotype profile we seek on your behalf. We are expert at generating candidate curiosity about a new opportunity, and consequently, we are able to engage with those that are happy in their current roles—delivering maximum talent for you.

Our Search Strategy to Build an Inclusive Work Culture includes the following action steps:

- Incorporate your specific diversity and hiring goals into the Anthem Executive Hiring Plan and Process customized for each executive search engagement.
- Meet with key stakeholders to discuss current demographic representation, underutilization and diversity placement goals, to review any potential obstacles, and brainstorm diverse recruitment sources and strategies.
- Recommend that your institution establish search committees and interview panels reflective of the community and characterized by diverse representation.
- Cast a wide net, marketing to a broad audience in a variety of media and formats in order to increase likelihood of reaching and attracting diversity segments of the candidate audience.
- Make direct contact by phone, email, and targeted direct mail to candidates identified as leaders with diverse backgrounds.
- Pace the search such that qualified candidates of diversity are kept informed, remain engaged in the process and maintain viable interest.
- When postings are required, advertise the positions widely in venues known to reach and attract a diversified candidate audience.

- Research professional organizations, institutions, associations, non-profit organizations, foundations, websites, publications, electronic newsletters, bulletin boards & news groups, list services, conferences, and community resources connected to diverse populations.
- Monitor the diversity of our candidate pool and adjust our resources and efforts as needed to reach the client's desired level of diversity in the candidate pool.
- Utilize networking to access exceptionally talented executives of diversity. As a firm with clients representing a wide variety of different industry niches, the firm has a considerable network of executive leaders from which to seek meaningful referrals to currently employed, successful leaders with diverse backgrounds.

Example Diverse Candidate Placements



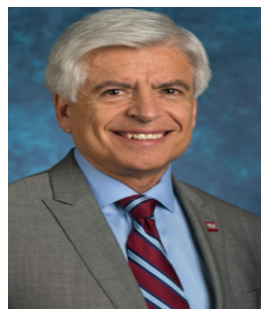
Dr. Keith Whitfield
UNLV President
1st African American to lead



Dr. Sonja Feist-Price
University of Michigan-Flint
Provost
1st African American to lead



Dr. Lesa Roe
UNT Chancellor
1st woman to lead



Dr. Dan Arvizu
NMSU Chancellor
1st Hispanic to lead



Dr. Joanne Woodard
UNT, VP of Diversity
1st to lead in the role



Marlon Lynch
Vanderbilt, Chief of Police
1st African American Chief



A Recent Anthem Executive Nationwide Publication

When Should You Recruit Again? How About Now?

If your institution has a critical leadership position open, your best chance of attracting top candidates might be while other campuses have suspended all hiring amid Covid-19

By [Mike J.R. Wheless](#).

THE CHRONICLE OF HIGHER EDUCATION, JULY 10, 2020



Most colleges and universities have put leadership recruiting on the back burner — waiting for the retreat of COVID-19 and for a better handle on its economic repercussions. But that doesn't mean they've stopped thinking about recruitment.

As a search consultant, I'm getting calls from current and potential clients with the same questions: "When is a good time to start recruiting again?" and "How do you see the current situation affecting our potential candidate pool in terms of quality and quantity of applicants?" From my team's perspective, better questions for institutions to ask themselves are: "Should we recruit now, while others are fearful and the talent we are after is not being inundated with competing offers? Or should we wait for this rare opportunity to pass us by?"

No doubt some readers will point out that it's in the financial interest of any search consultant to urge clients to restart their recruiting. However, there are actually good, logical reasons for higher education not to freeze all executive hiring for too long.

Institutions with key leadership positions unfilled will need to move forward with the hiring process at some point. Once hiring resumes, it will trend toward recruiting leaders who can meet academe's new normal — namely, people who can develop innovative strategies so that any future disruptive events don't set back campus operations as deeply as Covid-19 has.

Fear versus opportunity. Some lessons on this topic may be gleaned from one of the most strategic investment minds ever to walk this earth. In 1987 the Berkshire Hathaway chairman and chief executive Warren Buffett laid out his stock-market strategy in a famous way: "We simply attempt to be fearful when others are greedy and to be greedy only when others are fearful." In recent months we have all heard phrases like "don't waste a good crisis" or "in crisis there is opportunity." Can that mind-set seem cold? Absolutely.

Yet we are seeing it play out in the headlines across higher education as leaders face very difficult decisions. For example, the University of Wisconsin system's president, Ray Cross, is [pushing to consolidate academic programs](#) across its campuses and ramp up online learning — something he said had to happen "if we want the system to survive on the other side of this pandemic." A faculty leader, objecting to the plan and the likely layoffs that would follow, noted: "Regents and legislators have talked about this for several years, and now they are taking advantage of the pandemic to try to do it."

I spoke recently with a university chancellor who took a similar approach to the fear-versus-opportunity question of our current crisis. His university, he said, much like others, has no choice but to cut. However, as we talked, the chancellor concluded that the timing also gave him the perfect opportunity to reallocate some resources and recruit new leaders who are professionally prepared for a post-Covid-19 environment. But he asked: "Should I wait until CV-19 is behind us to start recruitment?"

My answer: Now might be the best time to find such leaders.

Why? As an example of what my team is seeing and hearing, I shared with that chancellor a recent experience: A month or so after Covid-19 hit, I was conducting a reference check when I reached out to the chancellor of a large multicampus system. Typically, when I call this leader's cellphone, he is so busy that my call goes directly to his voicemail. He might call back a few days later, or I'll hear from his assistant to schedule a call. This time, to my surprise, the chancellor immediately picked up. We talked about the reference and a host of other topics for more than 30 minutes. He sounded relaxed and happy to speak with another human being.

The lesson: Now might be the best time to talk with potential candidates whose daily schedules — outside of Zoom calls — tend to be a lot more open and flexible than usual.

Virtually no competition. The fact that Covid-19 has caused most colleges and universities to shut down recruitment is a net positive for those institutions that buck the trend and proceed with hiring. They can take advantage of a window of time in which they will have a better chance of attracting the best-possible candidates because they will not be competing with a myriad of concurrent searches across the country.

Last winter, when the Covid-19 pandemic started, everyone was understandably in full panic mode, and it became much harder than usual to reach potential candidates in searches. Now that the dust has settled somewhat, candidates are much easier to reach. They have more time for deep conversations than they would in a normal era, when they would be running from meeting to meeting and event to event. Most are confined and at their desks. And with technology advancements, we are now conducting the entire interviewing and hiring process remotely.

When Covid-19 finally slows down, pent-up demand will open the recruiting flood gates, and everyone will be chasing the same talent at the same time.

Once I spelled all of this out for the chancellor, he said the logic made sense and asked my team to begin recruiting for a vice president's position.

While the Covid-19 pandemic has caused us to adjust our search process, it certainly has not impeded our progress in recruiting top talent. In fact, the crisis has enhanced it. From the perspective of a seasoned recruiter who has been at this for more than 20 years, no matter what industry you are in, I think waiting for others to begin recruiting again for the same talent is not an optimal choice.

Sections: [ADMINISTRATION BUSINESS LEADERSHIP](#)
[Mike J.R. Wheless](#)

Mike J.R. Wheless is a search consultant and a founder of Anthem Executive, based in Houston.



Closing Remarks

We would be honored to serve The University of Iowa. This is an important search, and we feel confident we can deliver a President who will Fight for Iowa! –Mike JR Wheless and the Anthem Executive Team



ATTACHMENT A PROPOSAL CERTIFICATION FORM

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

(X) 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, X 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.

Anthem Executive LLC
(firm)

713-581-4433
(phone number)

5223 Norbone Ln., Ste. A Houston, TX
(address)

(fax number) _____

Mike "J.R." Whelose
(by)

85-106-2103
(Federal ID Number)

President
(title)