

Executive Search Preparation Worksheet

How to Use This Worksheet

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Why Use This Worksheet

Starting the search for an executive position within your organization can feel like a daunting task. The worksheet beginning on the next page is designed to help your team walk through key considerations to ensure you are planning for a successful search, whether conducting it internally or with the support of a firm like Edgility.

Organizational Crises: When an organization is facing financial difficulties, reputational damage or significant external changes.

Leadership Gaps: When organizational restructuring or expansion occurs and a new role or department is created.

Worksheet

1. Identify & Plan to Engage Stakeholders

Who will make the final hiring decision and who will be involved in the decision?

Enter Answer Here

Considerations:

- If this is a role who reports to a Board of Directors? If so, will the board make the decision with input from staff, community, etc.?
- If you appoint a search committee, will that committee be charged with making a recommendation to the board/hiring manager under the assumption their recommendation will likely be approved?
- Is there a sole hiring manager who will make the decision, with input from others?

Who else needs to be consulted early on in the process?

Enter Answer Here

Considerations:

- If you are a community-based organization or school, how will you ensure that your stakeholders feel engaged and consulted through the process?
- Are there external partners, donors or other important influencers who should be included in your initial needs assessment or final hiring process?
- How do we clarify for each group the extent of their potential involvement and their influence on decisions?

How do we want others (staff, community partners, etc.) to participate in the process?

- Complete a survey or distribute another widespread, objective instrument to gather feedback to inform the crafting of the job description and candidate profile
- Conduct focus groups, interviews, other face-to-face interactions to inform the crafting of the job description and candidate profile
- Offer the opportunity for community members and staff to engage with finalist candidates before they are hired
- Provide opportunities for ongoing conversation and engagement between the decision maker(s) and other stakeholders during the process
- Other:

How do we plan to communicate this transition to others (staff, community partners, etc.)?

- Email or other written communication
- Personalized outreach via phone or in-person communications
- Announcement at a public meeting or other broad forum
- Other:



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2. Define the Ideal Candidate

What skills, qualities and characteristics do we most value in the new leader?

Enter Answer Here

Considerations:

- Work Experiences (professional roles and experiences)
- Background Experiences and Characteristics (personal background, things specific to their individual story)
- Personal Qualities (diligence, loyalty, learning orientation, etc.)
- Management and Leadership Experience (who they've managed and in what capacity, their leadership track record of success, etc.)
- Content Expertise (background serving youth and families, experience leading similar programs/services, finance and strategic planning experience, etc.)

3. Establish Next Steps

What is our preferred timeline to have a new leader in place? What contingencies can we put in place if we are not able to meet this timeline?

Enter Answer Here

Considerations:

- When do we ideally want someone in this role?
- What is the typical hiring cycle for this role?
- How do we balance any urgency we have about having someone in the position with the need to ensure stakeholder input/buy-in and the need to lead an equitable selection process?

Can we lead this search on our own? If not, where do we need external support?

We can lead the search on our own.

We need external support with:

Sourcing Candidates

Additional Bandwidth

Hiring Expertise

Market Expertise

External Validation

Other:

If we need to hire external support, what are we looking for in a partner? What are the criteria we want to use to gauge which firms could be the best fit?

Do we need a firm who knows our sector well and understands our programmatic context?

Do we want to prioritize sourcing and the recruitment of a high quality candidate pool?

Do we want to prioritize a firm's ability to lead an intentional, evidence-based hiring process?

How do our priorities around diversity, equity and inclusion play into our selection of a firm?

Other:



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If we need to hire external support, what is our budget for doing so?

Enter Answer Here

Considerations:

- What are the opportunity costs of running a search ourselves (i.e. bandwidth, extra time it could take to lead it internally, potential costs to other priorities)?
- What are the financial costs to us if we lead the search ourselves and are not successful?
- How much can we spend on our search versus our other core priorities?
- need to ensure stakeholder input/buy-in and the need to lead an equitable selection process?

4. Reach Out to Edgility

Feeling prepared? Let's get to work. Contact info@edgilitysearch.com to schedule a free 30-minute consultation with our team.



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