KEES
Alford Executive Search

Executive Search RFP Checklist

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Preparing an RFP for a CEO, Executive Director, or other senior leadership search? Use this checklist to give prospective search partners the information they need.

ABOUT YOUR ORGANIZATION

☐ **Organization Overview:** Briefly describe your mission, history, programs/services, geographic reach, annual budget, staff size, and communities or constituents served.

☐ **Leadership Transition Context:** Explain why the position is open. Is this a retirement, planned succession, organizational growth, unexpected departure, newly created role, or other transition? The reason for the search will help prospective partners give you an approach that fits.

☐ **Strategic Priorities:** Identify the most important opportunities or challenges the incoming leader will inherit. What does your organization need to accomplish over the next several years?

ABOUT THE POSITION

☐ **Position Overview:** Provide the current job description or a summary of the role, reporting relationship, major responsibilities, and anticipated compensation range, if established.

☐ **Leadership Profile Development:** Indicate whether you expect the search firm to help your Board, Search Committee, and stakeholders define the competencies, experience, leadership characteristics, and priorities needed in the next leader.

SCOPE OF THE SEARCH

☐ **Stakeholder Engagement:** Describe the stakeholders you expect to participate in the process and ask firms how they would gather and incorporate their input.

☐ **Candidate Recruitment Strategy:** Ask firms to explain how they will proactively identify and recruit qualified candidates, including individuals who may not be actively looking for a new position.

☐ **Candidate Assessment:** Ask how candidates will be screened and evaluated against the leadership competencies established for the position.

☐ **Interview and Selection Support:** Clarify the support you expect for Search Committee and Board interviews, finalist evaluation, decision-making, and offer negotiation.

☐ **References and Due Diligence:** Ask firms to explain their approach to professional references, background verification, and other appropriate candidate due diligence.

☐ **Transition and Onboarding:** Determine whether the engagement should include support after the candidate accepts the position. Ask firms what transition and onboarding services are included.

ABOUT THE SEARCH PARTNER

☐ **Relevant Experience + Assigned Team:** Ask for examples of comparable searches, relevant sector experience, references, and information about the professionals who will lead the search.

☐ **Search Timeline + Communication:** Provide your desired completion date and ask firms to propose major milestones. Ask how frequently you can expect progress updates/communication.

☐ **Fees, Expenses + Guarantee:** Request a clear explanation of professional fees, expenses, payment schedule, additional costs, and the firm's placement or success guarantee.

SELECTING YOUR PARTNER

☐ **Evaluation Criteria + Interview Process:** Establish your evaluation criteria before issuing the RFP. Consider relevant experience, methodology, assigned team, understanding of your needs, communication approach, references, fees, and overall proposed partnership. Interview your finalist firms whenever possible.