



THE FINALIST INTERVIEWS: A CHECKLIST FOR THE SEARCH COMMITTEE CHAIR

While Wickenden Associates handles most of the logistical arrangements for the *semifinalist* interviews, the complexity of the *finalist* interview visits requires that the school assume most of the planning responsibility.

FIRST STEPS FOR THE SEARCH CHAIR (OR HIS OR HER DESIGNEE)

- Work with the school administration to **select appropriate dates for each of the two-day visits**, striving to complete all of the visits within as narrow a window as possible without unduly disrupting school life.
- **Notify all of the finalists by telephone**, confirming their continuing interest in the position and expressing the committee's enthusiasm about their candidacies. Let the finalists know whom they should work with to finalize travel and hotel arrangements.
- Determine whether you will **notify semifinalists not selected as finalists** or whether you would like Wickenden Associates to handle that assignment.
- Decide what **additional materials about the school and community** each of the finalists should receive and arrange to have then delivered promptly to each candidate.
- **Develop interview schedules** for each of the two-day visits, striving to ensure that each of the finalists has a similar experience and exposure to the various constituencies. (A **Sample Finalist Interview Schedule** is included in the online Appendix to the search manual; it is available at www.wickenden.com/appendix. While you will undoubtedly have to adapt this schedule to the unique structure of your school, the sample should provide you with helpful guidance about the way in which the visits can be structured.)
- **Assign a host/shepherd** to each of the finalists to provide introductions and to ensure that they stay on schedule throughout their visits.
- **Assign a host for each of the finalist spouses.** These hosts will be responsible for reaching out to the spouses prior to the visit to inquire about any particular interests or issues they would like to explore during their visits and then arranging a visit schedule that reflects those interests.
- **Determine what information you will provide to each person on the interview schedule.** (Typically, this would be the finalist's full résumé, although some committees opt to prepare biographical paragraphs instead so that the information will be more standardized.) **Assign someone to ensure that this material is photocopied in advance and made available at each of the interviews and group meetings.**
- **Communicate with the school family** throughout the finalist visit period, sharing appropriate information about the candidates and describing opportunities for group meetings with the finalists for those who are not on the individual interview schedule.

THE EVALUATION PROCESS

Wickenden Associates' online **Finalist Evaluation Form** (view a sample at <https://www.surveymonkey.com/s/sampleevalform>) provides an efficient way to collect and rapidly process feedback from the school community regarding each of the finalists. Shortly after the last visit is completed, we will provide the Search Committee with a full report that includes both quantitative data and a complete transcript of open-ended comments regarding each of the candidates, organized by constituency.

In order to ensure that the online evaluation process proceeds smoothly, the Search Chair or his/her designee must work with Wickenden Associates to ensure that the following steps are taken:

- **Review the sample form** and let us know of any changes you would like to make to tailor the form to your needs. Once you have done that, we will provide you with a unique link to your form for distribution to the school community.
- **Decide whether you will require respondents to provide their names** or allow them to reply anonymously. (There are good arguments for either approach, which we would be happy to discuss with you if you wish.)
- **Notify us when each of the names of the finalists becomes public** so that we can add them to the evaluation form.
- **Set a deadline** for the return of comments for each of the finalists (typically about 24 hours after the end of each visit).
- **Send an email** to all members of the community who will be invited to participate in the evaluation process, explaining how the process will work, **providing the direct link** to the form, and communicating the deadline for responses. Typically, the email message is sent just prior to the visit of each finalist, redirecting evaluators to the same form each time.

COORDINATION OF REFERENCE CHECKING

While the finalist visits are occurring, Wickenden Associates will be completing the comprehensive reference checking on each candidate. As we outline in our search manual, we encourage the Search Committee to participate in this effort if members wish to do so. We ask, however, that you coordinate these initiatives with your consultant to ensure that there is not duplication of effort.

During this phase, the Search Chair or his/her designee should:

- Let us know ASAP if any **specific questions** emerge regarding a finalist that you would like us to pursue during our reference-checking interviews.
- Remind Search Committee members that **all reference-checking activity should be coordinated with Wickenden Associates** and that written reports of any reference conversations conducted by a member of the Search Committee should be prepared and shared with all members of the committee.