



PROPOSAL

George Mason University
GMU-1826-23: Recruitment Services

DUE DATE:

September 7, 2022 @ 2:00 PM Eastern

ATTENTION:

Sara Siddall

Strategic Sourcing Manager
ssiddall@gmu.edu

Erin Rauch

Assistant Director, Purchasing
erauch@gmu.edu
George Mason University
Fairfax, Virginia

PREPARED BY:

Carrie Coward

President
ccoward@summitsearchsolutions.com
Summit Search Solutions, Inc.
Asheville, North Carolina



September 7, 2022

Thank you for the opportunity for Summit Search Solutions to submit a bid for the George Mason University GMU-1826-23 Recruitment Services request. In the pages below, you will find answers to the questions outlined therein. Please reach out if you desire further information or clarification. We would love to represent George Mason University with its recruitment efforts as a preferred vendor.



Purchasing Department
4400 University Drive, Mailstop 3C5
Fairfax, VA 22030
Voice: 703.993.2580 | Fax: 703.993.2589
<http://fiscal.gmu.edu/purchasing/>



INVITATION FOR BID GMU-1826-23

ISSUE DATE: August 8, 2022

TITLE: Recruitment Services- Contingency and Retained

PRIMARY PROCUREMENT OFFICER: Sara Siddall, Strategic Sourcing Manager, ssiddall@gmu.edu

SECONDARY PROCUREMENT OFFICER: Erin Rauch, Assistant Director, Purchasing, erauch@gmu.edu

BID DUE DATE AND TIME: September 7, 2022 @ 2:00PM Eastern Time (ET).

PLEASE NOTE:

Public Bid Opening: Due to the Coronavirus/COVID-19 outbreak a public bid opening will not be held. The Primary Procurement Officer will receive all bids electronically and will tabulate the bid prices in a Bid Tab. The Bid Tab will then be reviewed by another Procurement Officer and the Bid Tab will be posted on [Mason's Purchasing website](#) under Current/Open Solicitations.

QUESTIONS/INQUIRIES:

E-mail all questions/inquiries for information to both procurement officers listed above no later than 4:00 PM ET on August 22, 2022. Responses to all questions will be posted on [Mason's Purchasing website](#) by 5:00 PM ET on August 25, 2022.

In Compliance With This Invitation For Bid And To All The Conditions Imposed Herein, The Undersigned Offers And Agrees To Furnish The Services At The Price Indicated In SECTION X, PRICING SCHEDULE.

Name and Address of Firm:

Legal Name: Summit Search Solutions, Inc.

Date: 9/7/2022

DBA: Summit Search Solutions, Inc.

Address: PO Box 9824 Physical Address: 369 North Fork Road
Asheville, NC 28815 Black Mountain, NC 28711

By: Carrie Coward
Signature

FEL/FIN No. 27-1451329

Name: Carrie Coward

Fax No. 828-254-3114

Title: President

Email: ccoward@summitsearchsolutions.com

Telephone No. 828-669-3850

SWaM Certified: Yes: X No: (See Section VI. SWaM CERTIFICATION for complete details).

SWaM Certification Number: 723039

This public body does not discriminate against faith-based organizations in accordance with the *Governing Rules, § 36* or against a Bidder because of race, religion, color, sex, national origin, age, disability, or any other prohibited by state law relating to discrimination in employment.

Summit's Experience

[Summit Search Solutions, Inc.](#) is a boutique executive search firm that specializes in senior-level searches in the higher education sector. Based in Asheville, NC, Summit has a diverse team of experienced recruiting consultants in strategic locations across the country including California, Kansas, Maryland, New York, North Carolina, and Utah. Working exclusively in the education and nonprofit sectors since 2001, Summit's associates remain on the pulse of the trends, structures, challenges, and opportunities our clients face. Day in and day out, we are engaged with the marketplace — building relationships and developing an ever deeper and more nuanced understanding of the education and nonprofit sectors, enabling us to become even more effective partners for our customers. Summit's clients range from small private institutions to top-tier research universities. We pride ourselves on personalized service, impeccable process, and results that surpass client expectations. Summit does no formal marketing; our growth has been 100% organic based on repeat business and client referrals.

MISSION AND PHILOSOPHY

Summit is a boutique firm intentionally. Incorporated in 2009, Summit's vision was a firm that is rooted in process, precision, and results. We envisioned a firm that was small and specialized with the ability to provide the highest level of focus and attention to each search. We have remained true to this vision. Summit does not take shortcuts – we put in the time, effort, and attention to get the results we and our clients strive for – high-quality, diverse candidate slates.

QUICK FACTS

- Incorporated in 2009, with higher ed search experience since 2001.
- Offices in California, Kansas, Maryland, New York, North Carolina, & Utah.
- Certified woman-owned small business in many states including VA, SWaM #723039.
- Summit's growth is 100% organic, based on repeat business and client referrals.
- Clients range from small private institutions to top-tier research universities.
- Perform 40-60 successful searches annually.
- A diverse team - <https://summitsearchsolutions.com/about-us/our-team/>.
- Extensive database as well as fresh primary research conducted for each search.
- Tailored search strategies include passive candidate outreach for each search.
- 70% of placements have been women or BIPOC individuals since 2018.
- Secure search committee candidate review and rating portal.
- Some liberal arts clients include Davidson College, Hobart and William Smith Colleges, Lesley University, Lewis & Clark College, Reed College, and Willamette University – to name a few.

SENSITIVITY TO DIVERSITY IN RECRUITING – OUR OUTREACH AND APPROACH

Building a robust and diverse candidate pool is critical to any successful search—yet, many institutions and search firms fall short on this front, relying too heavily on advertising and databases without taking the time to do diligent research to identify and contact passive candidates and candidates from underrepresented groups. Summit goes to great lengths to identify and contact passive candidates for every search, a strategy that enhances the quantity, diversity, and quality of the candidate pool. We spend significant time with our clients, gaining an understanding of each job role and what a strong and diverse candidate pool would look like. With those insights, we build tailored outreach strategies for each search and provide clients with data to show the steps that we have taken and the outcomes of each. Our references can attest to the fact that we provide unmatched candidate sourcing, and that our diversity outreach and placement statistics are on par with, or ahead of, other firms.

Summit's commitment to diversity and to providing diverse candidate slates is an area where we excel, and our clients take note. Our candidate slates typically include 20% or greater BIPOC candidates, with some slates over 40%. From January 2017 through July 2022, we have placed 205 individuals. The 205 placements break down as follows:

- 35% identify as BIPOC (Black, Indigenous, or persons of color)
- 53% female
- 47% male

SEARCH PROCESS AND METHODOLOGY

Summit agrees to the Scope of Work outlined within VIII of this request. Below is a detailed list of Summit's Search Process. All steps are included in a Comprehensive (Retained) search.

1. PREPARATION

- Position and needs are analyzed during an intake process that involves listening sessions with key stakeholders.
- Implicit Bias training can be facilitated if requested.
- Summit will share insights from the intake process with the hiring executive and the search committee. These insights will help the university identify key areas that the incumbent will need to develop and/or focus on. This information will inform the development of the position prospectus (job announcement).
- The position prospectus and marketing materials will be created and approved.
- The recruiting strategy will be formulated.
- The search timetable will be finalized.

Deliverables: intake summary, position prospectus, search timeline

2. RECRUITMENT

- Extensive, nationwide, inclusive sourcing strategies are employed that involve advertising, networking, and passive candidate outreach.
- Summit's extensive database will be utilized to identify networking contacts and prospects. In addition, "fresh" primary research is done for every search to identify information for potential candidates. This primary research is especially important for searches in the lead diversity role. A search firm's over-reliance on their database is not good enough. It is essential to do continual research to seek out new talent.
- Diversity sourcing strategies are implemented and tracked and data is shared with our clients to show the exact steps we have taken and the outcomes of each. We track EEO and veteran's status data on all applicants and provide that data to clients.
- Summit will utilize formal and informal mechanisms for disseminating information about the position. Passive sourcing - tapping those individuals in "like or feeder roles" who may not be actively looking - is essential to success and greatly enhances the quantity and quality of the candidate pool.
- A rubric will be developed for the search committee to use as an assessment tool.

Deliverables: position posting, documentation of prospect pool and outreach by Summit, rubric

3. EVALUATION

- Applicants will submit materials via a secure web-based portal. The portal allows Summit to move candidates through five levels. Applicants come in at Level 1.
- Credentials will be reviewed by Summit and those who meet minimum criteria will be advanced to Level 2 for further vetting by Summit.
- Top prospects will be screened, interviewed, and evaluated by Summit, based on criteria agreed to by the search committee. Select candidates will be moved to Level 3 in the system.
- After the application window is closed, Summit provides access to the portal for the search committee to access candidate materials. The system allows for search committee members to rate their interest in the Level 3 group of candidates. Summit creates a summary report that the committee uses as a decision-making tool to narrow the candidate pool to focus on the top prospects.
- Search committee members rate the Level 3 prospects and select semi-finalists for initial interviews.
- Note: Even though we encourage the search committee members to focus on the candidates we advance to Level 3, search committee members are able to view all applicants at all levels and are welcome to ask questions or make cases to consider candidates they wish to advocate for. Final decisions on candidate statuses always rest with the committee.

Deliverables: Applicants will be shared with search committee (divided into levels mentioned above). All applicants are transparent to the committee. Also, ratings report is compiled and shared with committee.

Summit's **secure** portal enables search committee members to access and review candidate materials, rate their interest levels on a select group of candidates, and enter their personal notes. Summit then creates a summary report that the committee uses as a decision-making tool to narrow the candidate pool to focus on the top prospects.



Confidential Search Committee Ratings Report

Applicants		Search Committee Member Ratings												Ratings		
First Name	Last Name	LP	TR	SF	CC	CH	EC	SP	SA	EW	DP	HS	★ ★ ★	★ ★	★	
Aryssa	Berrios	3	3	3	3	3	3	3	3	3	3	2	10	1	0	
Kent	Knowell	2	3	1	2	3	3	3	3	3	2	3	7	3	1	
Christie	Civitella	3	1	3	2	2	3	3	3	2	3	3	7	3	1	
Sian	Bjango	2	3	3	3	1	3	2	1	3	3	3	7	2	2	
Al	Rodriguez	2	3	2	3	1	3	3	1	3	3	2	6	3	2	
Jeff	Williams	2	2	1	2	3	3	2	2	2	3	3	4	6	1	
Kimberly	Myricks	2	2	2	2	1	3	3	2	2	3	3	4	6	1	
Amy	Chen	3	2	1	2	2	3	2	1	3	2	3	4	5	2	
Bob	Barret	1	3	2	1	3	2	1	1	3	2	2	3	4	4	
Lauren	Satterlee	2	1	3	1	1	2	2	1	2	3	2	2	5	4	
Colton	Baxter	2	1	2	1	2	2	2	1	2	1	3	1	6	4	
Robert	Mick	2	2	2	1	3	2	1	1	2	1	2	1	6	4	
Jerrard	Coleman	1	1	2	1	1	2	1	2	2	1	2	0	5	6	

4. SEMIFINALIST INTERVIEWS

- Summit helps to create interview questions/protocol for search committee use.
- Scheduling of interviews occur.
- Semi-finalist interviews occur (typically video-based). Summit project leader will attend.
- Search committee debriefs and makes a recommendation of finalists to the hiring authority.
- Finalists are recommended. Hiring manager reviews the committee's recommendation and selects finalists.

Deliverables: Summit participates in semifinalist interviews and documents feedback

5. FINALIST INTERVIEWS

- Coordination and implementation of campus visits for finalist candidates occur.
- Data is collected and reporting for strengths and concerns for each finalist candidate are made.
- Reference checking and background checks are completed.

Deliverables: data collected from finalist process, reference reports, background check reports

6. SELECTION & NEGOTIATION

- Organization feedback is assessed.
- Offer is presented to the candidate and details negotiated.
- Start date and onboarding plan are crafted.

PRICING SCHEDULE

- VIII. SCOPE OF WORK:** It is the University's intent to establish one or more contracts with selected firms to assist with recruitment for open positions. The University has had approximately 70-80 retained and contingent searches in the last two years which have resulted in approximately \$800,000.00 in fees. Selected contractors are not guaranteed a minimum quantity of work.

The low bidder will provide services in accordance with the following:

- Solicit input from university stakeholders to understand and ascertain required information to understand the role, responsibilities, qualifications, and experience needed for positions. The University anticipates using winning bidder for a variety of mid and senior-level positions such as Vice Presidents, Directors, Associate Directors, etc.
- Work with stakeholders to assist in the development and review of job specifications to enhance the recruitment process and present the University in a favorable position for candidate recruitment.
- Source job candidates through a number of different channels to attract qualified candidates. The winning bidder will be expected to source candidates locally, regionally and nationally.
- Create and manage candidate pool. Reach out to qualified candidates to gauge interest and confirm qualifications.
- Screen candidates in pool to ascertain if candidate is qualified.
- Verify educational background, licensing or required credentials to perform job.
- Meet with stakeholders on a regular basis to review candidate pool. Make recommendations on hires.
- Encourage candidates to submit application through the University Human Resources application portal. Answer candidates' questions representing the University. Ensure candidates understand the application process and submit all required documentation. Maintain communication with candidates throughout the application process.
- Notify candidates who were not selected.
- Coordinate candidate flights and any other travel arrangements as necessary.

In addition to other stated criteria, the following is required in order to be considered responsive:

- Contractor's place of business and staff servicing this contract must be physically located in the continental United States
- Contractor must have previously placed at least one permanent position for an institution of higher education. That information must be listed as one of the references below

- IX. CONTRACT ADMINISTRATOR:** Sara Siddall, Strategic Sourcing Manager, or their designee, shall serve as Contract Administrator and shall use all powers under the contract to enforce its faithful performance. The Contract Administrator, or their designee, shall determine the amount, quality, acceptability, and fitness of all aspects of the services and shall decide all other questions in connection with the goods/services described herein. The Contract Administrator, or their designee, shall not have the authority to approve changes in the contract which may alter the concept or which calls for an extension of time or a change in the contract price. Any modifications made must be authorized by Mason's Purchasing Department as a written addendum to the contract.

- X. PRICING SCHEDULE:** The University is looking for firms that can offer a percentage commission of the candidates first year salary. Travel expenses for candidates shall only be reimbursed in accordance with the Commonwealth of Virginia's per diem rates and Mason's travel policies. <http://fiscal.gmu.edu/travel/>. There will be no reimbursement for administrative costs to include but not limited to; faxing, office supplies, phone etc. All responsive vendors will be selected based on price.

Retained Search Fee (% of first year's base salary)	Contingency Fee (% of first year's base salary)
27%	NA

Note: Summit does not offer contingency services. Please refer to our [additional tiered service model offerings](#) listed in our proposal along with a detailed chart.

- XI. SOLICITATION TERMS AND CONDITIONS:**

- A. **GENERAL TERMS AND CONDITIONS – GEORGE MASON UNIVERSITY:** <http://fiscal.gmu.edu/purchasing/do-business-with-mason/view-current-solicitation-opportunities/>

- B. **SPECIAL TERMS AND CONDITIONS:**

1. **AWARD:** George Mason University will make an award to one or more of the lowest responsive and responsible bidder(s) based on percentage submitted and meeting the requirements of the solicitation. The two categories will be awarded independently. Mason reserves the right to reject any or all bids, in whole or in part, to waive informalities and to delete items prior to making the award, whenever it is deemed in the sole opinion of Mason to be in its best interest. To qualify as a responsive bidder, a bid must have been submitted on time and materially satisfy all mandatory requirements identified throughout this IFB, including the acceptance of Mason's standard contract. Deviations or exceptions to Mason's standard contract or any other stated requirement may result in the bid being classified as non-responsive.

UNIQUE TIERED SERVICE OPTIONS

Summit was founded on the belief that search services should adjust to differing needs, situations, budgets, and circumstances. While some searches may very well require comprehensive support, others may benefit from a more streamlined approach focused largely on outreach and building the candidate pool. For that reason, we offer a continuum of tiered service options, enabling clients to customize the support they receive to suit their specific needs. **Based on the requirements of this request, we are including in the Pricing Schedule a bid of 27% commission of the candidate's first year salary as our quote for the Retained Search Fee (Comprehensive model).**

STEPS IN SEARCH PROCESS	Comprehensive	Sourcing Plus	Sourcing Basic
Intake & Strategy Development	✓	✓	✓
Position Profile & Marketing Materials Developed	✓	✓	✓
Recruitment Advertising & Position Postings	✓	✓	✓
Prospect Research & Outreach	✓	✓	✓
Diversity Sourcing Strategies	✓	✓	✓
Candidates Interviewed & Assessed	✓	✓	✓
Presentation of Candidates	✓	✓	✓
Semifinalist Selection	✓	✓	✓
Semifinalist Interview Coordination	✓	✓	
Selection of Finalists	✓	✓	
Reference & Background Checks	✓	Negotiable	
Offer Presentation & Negotiation	✓		
Onboarding Planning	✓		
Guarantee	Full	Partial	Discounted

Comprehensive (Retained) Model

The comprehensive model provides full service to the university during the entire process – onsite listening sessions, prospect research, outreach/recruiting, assessment, candidate profiling, candidate management, as well as comprehensive reference and background checking and offer negotiation. This model involves consultant travel to the university (typically two to three times during the search) and involves meetings with multiple stakeholder groups throughout the process (boards, key stakeholders, search committees, etc.). This model offers a full guarantee.

Retained Search Fee*	27% commission of the candidate's first year salary.
Administrative Fees	None
Guarantee	Full guarantee. If the search needs to be re-done within the first 12 months, we will repeat the search one time on an expenses-only basis (no project fee).

Comprehensive (Retained) Model conditions:

- No markup on reimbursable costs such as travel.
- All payment terms are net 30 or in accordance with selected payment method outlined in section XII. METHOD OF PAYMENT.
- No charges for any administrative functions of any type i.e. phone, paper, office supplies, etc.
- See Summit's guarantee above.

Payment Schedule:

Summit agrees to the Payment Schedule outlined below:

- Payment will be made for retained searches as follows:
 - One-Third (1/3) of payment will be billed 30 days upon start of search.
 - One-Third (1/3) of payment will be billed 90 days from start of search.
 - Remaining one-third (1/3) of payment will be billed 30 days from search completion and placement of candidate.

OTHER TIERED SERVICE MODELS: (refer to the comparison chart above)

Sourcing Plus Model

Sourcing Plus is a modified search that focuses on marketing the job, attracting a high-quality candidate pool, and reviewing and identifying the best candidates to pursue. The sourcing plus model follows the comprehensive search process up to the selection of finalist candidates. After finalists are selected, the institution takes solo responsibility for managing the balance of the end-stage of the process (for example internal campus staff would coordinate scheduling, off-list referencing, and campus visit coordination). We do remain involved through the end of the project in a periphery manner. Sourcing Plus offers a partial one-year guarantee.

Project Fee	Range typically equates to 18-25% of the candidate's first year salary.
Administrative Fees	None
Consultant Travel	Optional; billed back at cost if a visit is selected.
Additional Expenses	<ul style="list-style-type: none">• Advertising and posting fees (usually \$1,500-2,500) - billed back at cost and approved by client.• Background checks billed back at cost if requested.
Guarantee	Partial. If the search needs to be continued or re-done within the first 12-months, we will do so at 50% of the original search fee plus expenses.

Sourcing Basic Model

Sourcing Basic focuses on marketing the opportunity and building the candidate pool. This model is offered in limited circumstances where Summit takes direction from the hiring manager to source candidates for a defined niche role. Candidates that are submitted to the client are pre-qualified based on key criteria. Summit leads the process up through the selection of semi-finalist candidates. Services are provided on an hourly or fixed-fee basis and are implemented virtually.

Project Fee	Offered at \$150/hour or priced as a fixed fee.
Administrative Fees	None
Consultant Travel	None
Additional Expenses	Advertising and posting fees (usually \$1,500-2,500)- billed back at cost and approved by client.
Guarantee	N/A

METHOD OF PAYMENT

Method of Payment: Summit Search Solutions chooses Option #3 – Net 30 Payment Terms. Upon selection Summit will enroll in the Paymode-X where all payments will be made electronically to the Summit's bank account.

ensure that electronic bid submissions have sufficient time to make its way through any filters or email traffic. Mason recommends you submit your bid the day prior to the due date.

- d. If your bid contains proprietary information you must submit two bid (pricing may not be held confidential or proprietary); one full bid and one with proprietary information redacted.
- e. Each email may not be larger than 20MB.
- f. All solicitation schedules are subject to change.
- g. Go to Mason's Purchasing website for all updates and schedule changes:
<https://fiscal.gmu.edu/purchasing/do-business-with-mason/view-current-solicitation-opportunities/>

6. **SPECIAL EDUCATIONAL OR PROMOTIONAL DISCOUNTS:** The Contractor shall extend any special educational or promotional sale prices or discounts immediately to Mason. Such notice shall also advise the duration of the specific sale or discount price.

XII. METHOD OF PAYMENT: PLEASE NOTE: THE VENDOR MUST REFERENCE THE PURCHASE ORDER NUMBER ON ALL INVOICES SUBMITTED FOR PAYMENT.

Option #1- Payment to be mailed in 10 days-The University will make payment to the vendor under 2%/10 Net 30 payments terms. Invoices should be submitted via email to the designated Accounts Payable email address which is: AcctPav@gmu.edu

The 10 day payment period begins the first business day after receipt of proper invoice or receipt of goods, whichever occurs last. A paper check will be mailed on or before the 10th day.

Option #2- To be paid in 20 days. The vendor may opt to be paid through our Virtual Payables credit card program. The vendor shall submit an invoice and will be paid via credit card on the 20th day from receipt of a valid invoice. The vendor will incur standard credit card interchange fees through their processor. All invoices should be sent to:

George Mason University
Accounts Payable Department
4400 University Drive, Mailstop 3C1
Fairfax, Va. 22030
Voice: 703.993.2580 | Fax: 703.993.2589
e-mail: AcctPav@gmu.edu

Option#3- Net 30 Payment Terms. Vendor will enroll in Paymode-X where all payments will be made electronically to the vendor's bank account. For additional information or to sign up for electronic payments, go to <http://www.paymode.com/gmu>. There is no charge to the vendor for enrolling in this service.

Please circle your payment preference or note it in your bid response.

Biographies of Key Personnel

Please note that the headquarters and all employees are physically located in the continental United States as required.



Carrie Coward
President

Carrie has close to 30 years of experience in human resources, executive search, and organizational development. Since 1997, Carrie has led hundreds of searches for leadership positions. Carrie started Summit Search Solutions in 2009 with a mission to create a firm that would offer specialized and customizable search solutions to the higher education and nonprofit sectors. Carrie is passionate about education and about the impact that executive search work can have on mission-driven organizations.

Carrie left the corporate world in 1997 to join Duffy Group, Inc., a national search firm. Her early work encompassed corporate, nonprofit, and higher education clients, including several Fortune 1000 companies.

Outside of her paid professional work, Carrie has served as a member of a school board and is on the leadership team of a regional women's giving circle. She volunteers her time to train groups on search strategy and process and provides some pro-bono search work.

Carrie is a native of Rochester, NY, and a summa cum laude graduate of the University of Buffalo. Carrie and her family have lived in Asheville, NC since 2001.



Arasi Adkins, MA
Senior Consultant

Arasi has 20 years of experience in human resources management and recruiting in both the K-12 and university settings. Arasi is an AIRS Certified Diversity and Inclusion Recruiter. Prior to joining Summit, Arasi served as Assistant Superintendent of Human Resources for Durham Public Schools, and before that as Assistant Vice Chancellor for Human Resources at North Carolina A&T State University. Arasi's passion is in identifying exceptional and diverse candidates and helping to match them with the right position at the right time in their career.

Arasi is a graduate of Virginia Commonwealth University with a bachelor's degree in sociology and a Master of Arts in Teaching. Arasi is based in Greensboro, NC.



Jan Asnicar, MS ABD
Senior Consultant

Jan has been conducting searches for colleges and universities since 2007 after a 25-year career as a university administrator. Prior to working with Summit, Jan led the higher education search practice at EFL Associates, and she was a partner at Storbeck Pimentel and Associates.

Jan has assisted a wide variety of institutions with more than 150 searches ranging from Chancellor/President, Senior Cabinet members, Provosts, Deans, and other senior administrative staff. She has worked with both public and private institutions and regularly customizes services to meet the needs of this broad client base. Her client base is national; she has conducted more than a dozen searches for presidents; she has developed relationships that often lead to repeat service opportunities. Jan joined Summit because of the firm's focus on meeting the individual needs of each client up to and including customization of search services.

Jan has presented at national and international conferences on such topics as succession planning, developing a career path, strategic planning, enrollment planning, and others. Jan is A.B.D. from the University of Minnesota and holds an M.S.W. from the University of Wisconsin, and a Master of Arts in Negotiation and Conflict Management from Baker University in Kansas. Jan is based in Wichita, KS.



Beth Baldino, MSW
Senior Consultant

Well-regarded by clients because of her strong relationship-building and assessment skills, Beth manages searches utilizing a variety of research and sourcing strategies. She is particularly talented at helping individuals and teams work efficiently – focusing on their most critical issues and working to reach their strategic goals. Her experience with human resources dates back to 1987, and she has been a member of Summit Search since 2009.

She has successfully filled numerous senior management positions, specialized administrative roles, and academic positions in a variety of educational institutions as well as nonprofit organizations. Prior to this role, Beth spent ten years in human resources in the corporate sector focused on staffing, college recruiting, employee counseling/consulting, and managing a staff of HR specialists. Her strong relationship and communication skills make her a natural contributor to any assessment process.

Beth has a Bachelor of Arts in Psychology from Rutgers University and a Masters in Social Work from Arizona State University. Beth is based in Asheville, NC.



Kristen Farha, MS
Senior Consultant

Kristen has worked in the higher education sector since 2004 and has been assisting clients with executive searches since 2016. Prior to recruiting work, Kristen held leadership roles in student services, enrollment, and marketing including her role as the Senior Faculty Facilitator and Student Services Coordinator at Baker University for over seven years.

Kristen manages mid and senior level searches including President, Vice President, Chief Financial Officer, Provost, Vice President of Marketing, Program Director, specialized faculty and more. Her strengths lie in coordination, prospect research, and outreach. She brings diligence to everything she is involved in and enjoys learning about each client's unique value proposition, so she can convey this expertly to potential candidates.

Kristen earned her Bachelor of Arts in Psychology from Wichita State University and her Master of Arts in Human Resources from Baker University. She serves as an Advisory Board Member for the Greater Wichita YMCA. Kristen is based in Wichita, KS.



Caitlin Hummel
Senior Consultant

Caitlin has over ten years of experience in recruiting in the higher education, nonprofit, and corporate sectors. Caitlin supports searches in academic leadership, institutional advancement, student affairs, specialized faculty, information systems, facilities/engineering, finance, enrollment, financial aid, and more. Caitlin is a master at pre-search research – identifying the ideal candidates to search for and reaching out to them. Her knowledge of higher education institutional structures and functions is a benefit to every search. She strives to have satisfied customers and continually goes above and beyond to meet their expectations.

Caitlin graduated from the University of South Carolina with a BS in Accounting and a minor in Vocal Performance. She began her career at Price Waterhouse-Coopers as an auditor and transitioned into recruiting as an executive recruiter at the Execu-Search Group in Manhattan. There, she focused on accounting and finance recruitment for Fortune 500 companies in various industries, including nonprofit, media/entertainment, banking, and asset management. Caitlin is delighted that her position with Summit involves being a positive advocate for mission-based institutions and organizations. Caitlin is based in Rochester, NY.



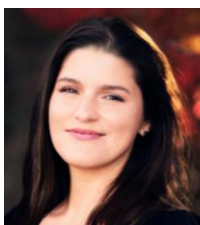
Lyndi Hewitt, PhD
Senior Consultant

Prior to joining Summit, Lyndi spent more than 20 years in academic and administrative roles in both public and private institutions of higher education. In addition to serving as tenure-track/tenured Sociology faculty at Hofstra University and the University of North Carolina Asheville, Lyndi has held key leadership roles including Director of Women's, Gender, and Sexuality Studies, Director of the Center for Teaching and Learning, and Chief of Staff in the Chancellor's Office.

At Summit, Lyndi leads searches and provides consultation to clients that support best practices in search preparation, objective candidate assessment, search committee dynamics, and understanding and utilizing equity-based search practices.

An award-winning teacher and recognized expert in applied social research, Lyndi has published in the *American Journal of Sociology*, the *Journal of Health and Social Behavior*, and *Mobilization*, among other venues. Her collaborative research with the Global Fund for Women has also been cited in *The Chronicle of Philanthropy*.

Throughout her career, Lyndi has leveraged her data analysis and relationship cultivation skills to build and maintain equitable, inclusive systems in higher education and nonprofit organizations. She holds a PhD in Sociology and a graduate certificate in Gender and Sexuality from Vanderbilt University (2009), as well as a certificate in Diversity and Inclusion from Cornell University (2020). Lyndi is based in Asheville, NC.



Andrea Martinez, MA
Research Associate

Andrea has held both teaching and administrative positions at all levels of the educational system from middle school through undergraduate and was most recently the Associate Dean of Admissions at a public, liberal arts university. She has also worked as the Director of Recruiting for a tech company, where she built out the national scale strategy for a start-up software platform. Andrea is especially skilled at helping clients navigate diversity, equity, and inclusion work in relation to community culture, as well as source talent that will expand institutions actively toward their collective vision and mission.

Andrea has a master's degree in Educational Leadership, has been the primary investigator on large, multi-year, federal Department of Education grants and has significant experience negotiating a wide variety of stakeholders toward a single goal. Andrea is based in Asheville, North Carolina.



Dick Merriman, PhD
Senior Consultant

Prior to joining Summit, Dick has had a robust career with over 30 years of leadership experience in the higher education and nonprofit sectors, including 22 years of service as president of the University of Mount Union (Ohio) and of Southwestern College (Kansas). A collaborative leader, Dick built effective systems for participatory decision-making that unlocked and channeled the energies of trustees, administrators, and faculty, enabling his institutions to achieve important successes in enrollment management, advancement, new academic program development, diversity and inclusion, and institutional finance.

Dick is deeply committed to the success of higher education and has worked throughout his career to help colleges and universities attract, retain, and develop talented, idealistic leaders. He has mentored many colleagues and has led numerous searches for senior administrators and key faculty positions.

Prior to becoming a college president, Dick worked for nine years in the advancement office of Le Moyne College in Syracuse, New York, rising to the position of vice president for institutional advancement. Dick provided leadership for campaigns at Le Moyne, Southwestern, and Mount Union that secured over \$100 million in gift support.

Dick earned his BS and MS degrees in the social sciences from Emporia State University in Kansas and his PhD in political science from Indiana University in Bloomington, Indiana. He received an honorary doctorate in leadership from Southwestern College in 2015. Dick is based in Raleigh, NC.



Tammarah (Tammy) Townes, MS
Senior Consultant

As a seasoned executive search professional, Tammy brings over 25 years of experience to the table, 15 of which are specialized in higher education. Tammy's strength is in prospecting and attracting quality candidates. She maintains positive relationships with both candidates and with search committees. Tammy finds satisfaction in providing diverse candidate slates and is motivated to be impactful in grooming BIPOC individuals for leadership opportunities. She has led searches in EEO and Affirmative Action as well as for lead diversity and inclusion leadership roles.

Tammy has supported over 500 searches and has specialized experience in higher education, nonprofit, and healthcare. Prior to working for Summit, Tammy worked for executive search firms including Storbeck Search & Associates, Salveson Stetson Group, and Diversified Search. Her search work spanned all aspects of executive leadership and administration.

Tammy has a Master's in Counseling Psychology from Temple University and a Master's in Healthcare Administration from Eastern University. Her undergraduate degree is in Psychology from Rowan University. Tammy is based in Maryland.

ATTACHMENT A:

ATTACHMENT A – SMALL BUSINESS SUBCONTRACTING PLAN

Bidders must advise any portion of this contract that will be subcontracted. It is the goal of the Commonwealth that over 42% of its purchases be made from small businesses. All potential bidders are required to include this document with their bid response in order to be considered responsive.

Small Business: "Small business (including micro)" means a business which holds a certification as such by the Virginia Department of Small Business and Supplier Diversity (DSBSD) on the due date for bids. This shall also include DSBSD certified women- owned and minority-owned businesses and businesses with DSBSD service disabled veteran owned status when they also hold a DSBSD certification as a small business on the bid due date. Currently, DSBSD offers small business certification and micro business designation to firms that qualify.

Certification applications are available through DSBSD online at www.SBSD.virginia.gov (Customer Service).

Bidder Name: Summit Search Solutions, Inc.

Preparer Name: Carrie Coward **Date:** 9/7/2022

Who will be doing the work: ☐ I plan to use subcontractors ☒ I plan to complete all work

Instructions

A. If you are certified by the DSBSD as a micro/small business, complete Section A of this form.

B. If the "I plan to use subcontractors" box is checked, complete Section B of this form. For the bid to be considered and the bidder to be declared responsive, the bidder shall identify the portions of the contract that will be subcontracted to any subcontractor, to include DSBSD certified small business for the initial contract period in relation to the bidder's total price for the initial contract period in Section B.

Section A

If your firm is certified by the DSBSD provide your certification number and the date of certification.

Certification number: 723039 **Certification Date:** 8/24/2022

Section B

If the "I plan to use subcontractors" box is checked, populate the requested information below, per subcontractor to show your firm's plans for utilization of any subcontractor, to include DSBSD-certified small businesses, in the performance of this contract for the initial contract period in relation to the offeror's total price for the initial contract period. Certified small businesses include but are not limited to DSBSD-certified women-owned and minority-owned businesses and businesses with DSBSD service disabled veteran-owned status that have also received the DSBSD small business certification. Include plans to utilize small businesses as part of joint ventures, partnerships, subcontractors, suppliers, etc. It is important to note that these proposed participation will be incorporated into the subsequent contract and will be a requirement of the contract. Failure to obtain the proposed participation dollar value or percentages may result in breach of the contract.

Plans for Utilization of Any subcontractor, to include DSBSD-Certified Small Businesses, for this Procurement

Subcontract #1

Company Name: _____ **SBSD Cert #:** _____
Contact Name: _____ **SBSD Certification:** _____
Contact Phone: _____ **Contact Email:** _____
Value % or \$ (Initial Term): _____ **Contact Address:** _____
Description of Work: _____

Subcontract #2

Company Name: _____ **SBSD Cert #:** _____
Contact Name: _____ **SBSD Certification:** _____
Contact Phone: _____ **Contact Email:** _____
Value % or \$ (Initial Term): _____ **Contact Address:** _____



Purchasing Department
4400 University Drive, Mailstop 3C5
Fairfax, Va. 22030
Voice: 703.993.2580 | Fax: 703.993.2589
<http://fiscal.gmu.edu/purchasing/>

IFB ADDENDUM NO. 1:

Date: August 25, 2022
Reference IFB #GMU-1826-23
Title: Recruitment Services- Contingency and Retained
RFP Issued: August 8, 2023
Proposal Due Date: September 7, 2023 @ 2:00 PM EST

The following changes are hereby incorporated into the aforementioned IFB:

1. ATTACHMENT B: VENDOR DATA SHEET

1. Qualification:
 - a. Removal of 5 years' experience requirement.
2. References:
 - a. Removal of 3 required reference, change to 1 required reference, must be higher education institution to match requirement of IFB.

I hereby acknowledge receipt of IFB #GMU-1826-23 Recruitment Services- Contingency and Retained.

Summit Search Solutions, Inc.

NAME OF FIRM

Carrie Coward

NAME (Print or typed)

Carrie Coward

SIGNATURE

8/30/2022

DATE

**ATTACHMENT B
VENDOR DATA SHEET**

Note: The following information is required as part of your response to this solicitation. Failure to complete and provide this sheet may result in finding your bid non-responsive.

1. Qualification: The vendor must have the capability and capacity in all respects to satisfy fully all of the contractual requirements.
2. Vendor's Primary Contact: Name: Carrie Coward Phone: 828-669-3850
3. Years in Business: Indicate the length of time you have been in business providing this type of good or service:
13 Years 8 Months
4. Include as an attachment to your bid a summary of your firm's history & biographies of key personnel.
NOTE: This information will have no effect on award.
5. References: Indicate below a listing of at least one (1) reference from a previously placed permanent position for an institution of higher education.

A. Company: Radford University Contact: Dr. Timothy Channell, Assistant Provost for Budget & Academic Operations
Phone : (540) 831-5119 Fax: (540) 831-6133
e-mail address: tchannell@radford.edu

B. Company: Idaho State University Contact: Brian Sagendorf, Interim Vice President for Operations
Phone : (208) 282-3343 Fax: () N/A
e-mail address: briansagendorf@isu.edu

C. Company: University of Utah Contact: Laura Marks, Chief of Staff
Phone : (801) 585-7968 Fax: () N/A
e-mail address: laura.marks@utah.edu

I certify the accuracy of this information:

Signed: Carrie Coward Title: President
Printed Name: Carrie Coward Date: 8/30/2022