

# Search Done Better™

 carterbaldwin  
executive search





CarterBaldwin exists to **transform** ...  
To help our clients, candidates, and  
team have more prosperous,  
impactful, and abundant lives

## CarterBaldwin “At-A-Glance”

- CarterBaldwin has consistently grown since our founding in 2000.
- Key industry recognition & awards
  - Consistently ranked a “Top 50” search firm, putting us in the top 1% of North American firms by revenue
  - A multi-year Forbes “America’s Best Search Firms” designee
  - “PE Power 100” and “Top 50 Higher Ed” firm
  - Multi-year Inc. 5000 fastest growing firm
- Our nine partners have completed over 2,000 successful search assignments.
- Virtually 100% of our clients are repeat, referred, or were candidates who had a great experience with our team.
- 65% of our searches are for Chief Executive Officers and their executive teams for organizations generally sized from \$50M - \$4B in revenue.
- 35% of our searches are in the nonprofit and academic sectors.

# Representative Clients

## Practice Areas

Many search consultants "choose" a practice area based on revenue goals. We've taken a different path... letting our practice areas choose us.

Each of our practice areas has grown from our partners' unique experiences and background in and around the sector. Rather than having to learn a client or market, we bring deep experience which creates deep alignment.

### Public



### Nonprofit



### Private



### Education

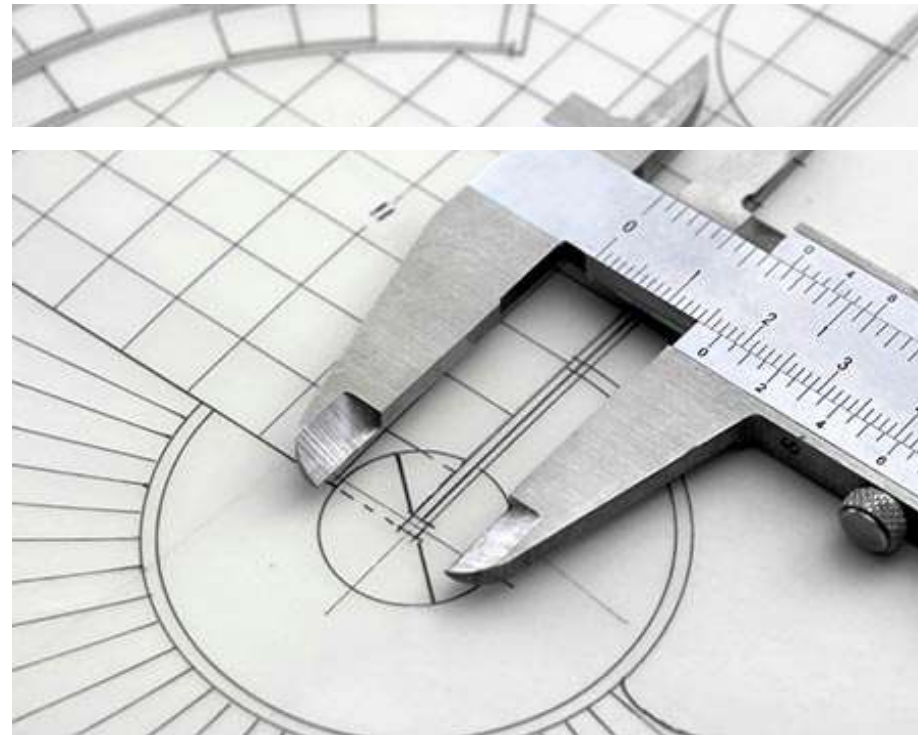


## Process

We've built and honed a proprietary 27-step search process that is tested and effective. Every part of our process is built to maximize the likelihood of predictable success.

Search is a people business, so there is plenty of "art" to what we do ... But in addition, we're devoted to proven process and metrics. The result is a more predictable and reliable outcome for our clients and candidates.

We train hard and have a continuous improvement mentality. We measure results and try to beat our records on speed and quality.

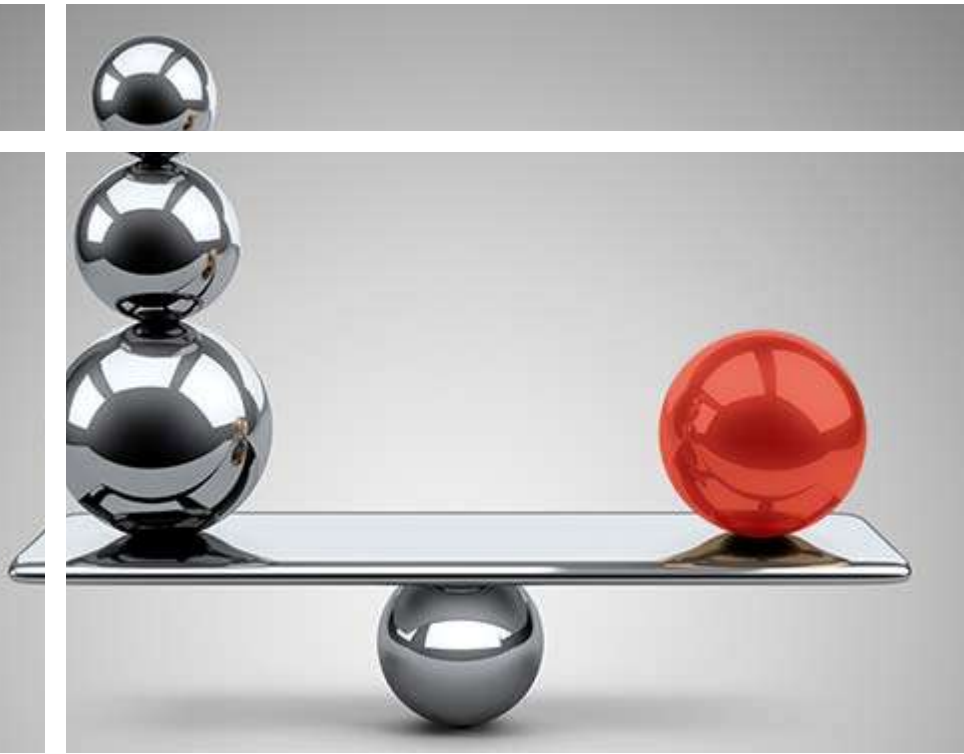


## Performance Retainer

We win when our clients win. As such, we've adopted a performance-based retainer that requires us to hit key deliverable milestones before we receive our full fee (culminating in a successful executive hire).

Most search firms require fees to be paid long before the conclusion of the engagement, not ours. Having our financial success tied to our client's success makes us a better firm.

For over 20 years,  
CarterBaldwin has been  
engineered and led to  
deliver maximum  
performance for clients.



Many search firms focus on being different. Since our inception we've just focused on being *better*. The thing we love about "*better*" is that it keeps us reaching ... driving continuous performance gains for our clients.

## Size

In selecting an executive search firm, size is very relevant. Too large could constrict the candidate pool because the search firm's clients are "off-limits." Large firms can also put sales pressure on partners, focusing them on winning business vs. executing searches.

Too small undermines key infrastructure and "muscle" to put behind searches. A committed partner without sufficient research and recruiting support is a formula for missed client expectations.

At CarterBaldwin, we manage our firm's size to make us better. While we're in the top 1% of retained search firms by size, our partner team is focused on delivering great search outcomes, and we have the resources behind them to deliver excellence, on time and on budget.

## Team

Our team is comprised of experienced, focused search professionals with a passion for excellence. We offer a better environment, better support and a better opportunity for success. Our structure delivers better research, recruiting, and project coordination than competitive firms.

Search done right is hard work, requiring curiosity, tenacity and a "never rest" mentality. People content with "good" don't like it here.

We expect a lot from our team because clients expect a lot from us. In return, we make CarterBaldwin a better place to work. We cultivate a fun, collaborative, team-oriented, and performance-driven culture. This yields better outcomes for our clients and candidates.

## Candidate Approach

In executive search the "product" is people ... candidates. In order to create a great "match," both the candidate and the client must win.

We work hard to understand what makes each client's search "special." We dig in with clients and their key stakeholders to become proficient in what they do, what makes them different from competitors, how they do it ... and importantly ... why they exist.

Armed with deep knowledge of our client and the unique circumstances surrounding their search, we then set to work identifying people that can not only do the job, but whose life will become more complete by joining our client. We build relationships and animate the opportunity for them, helping them to explore if it could make sense. Doing this well and consistently requires seeing candidates as human beings, each with a unique set of skills, experiences, life circumstances, "wiring," and desires.

We strive to treat candidates as we would want to be treated. We work hard to communicate candidly, openly, and honestly with candidates throughout and after a search. Not surprisingly, a significant number of our new clients come from executives we treated well when they were candidates on one of our searches ... even when they didn't get the job. We consistently hear, "You guys treated me better."



CarterBaldwin values diverse points of view and is committed to inclusiveness in hiring our own employees and those of our clients. We operate our business with the highest ethical standards and abide by all applicable laws.

## Scope of Services

### Build a Timeline

We create a calendar of events that guides the committee to a predictable conclusion. We begin with the end in mind, identifying a date for the Head of School's final selection and appointment.

The timeline synchronizes search committee actions, choreographing a complex process driven by multiple constituents to complete the search on time and budget.

### Develop a Profile

We invest time on the front end of the search to understand our client's culture, history, current state, and vision for the future that exists among the major stakeholders. Some clients have delegated this step to the search committee from whom we take our direction. Others prefer CarterBaldwin solicit input and guidance directly from the institutional community.

### Source Qualified Candidates

CarterBaldwin has a dedicated research team that works to build a unique database of prospective candidates. Most often we are engaging with passive candidates not actively seeking a position; in fact, they are satisfied and fully involved in their current position, unaware of the opportunity.

### Present Candidates for Interview

CarterBaldwin will lead the search committee in evaluating candidates, resulting in the identification of semi-finalists, finalists, and ultimately a sole finalist.



CarterBaldwin is listed among the top 1% of search firms in the nation and has been named by *Forbes* as one of "America's Best Executive Search Firms" two years in a row.

# Analytics & Assessments



CarterBaldwin utilizes a 3<sup>rd</sup> party vendor to maintain our independence and provide our clients with further insights beyond our perspective. The Predictive Index Behavioral Assessment™ is an easy-to-use, science-based framework that shines a light on candidate's core drives and offers actionable insight into needs, behaviors, motivations, and development areas. CarterBaldwin has certified PI consultants to assist in applying objective and targeted data. All candidates presented by CarterBaldwin will have taken this assessment prior to meeting with our clients. We have also chosen to send each candidate their results, as we feel it is important they have the opportunity to benefit from and to agree/ refute the information.



The Predictive Index Behavioral Assessment™ is scientifically validated and used in an array of industries across the globe. With nearly 500 criterion-related validity studies and more than 22 million assessments completed, the PI Behavioral Assessment™ has been designed to be the most effective, simple, and easy to use science-based assessment. It provides an accurate depiction, or pattern, of core drives, and therefore insight into needs and behaviors. To learn more about PI please visit <https://www.predictiveindex.com/>.

The Predictive Index assessments and recommended practices comply with The Equal Employment Opportunity Commission (EEOC), Uniform Guidelines on Employee Selection Procedures (1978), American Psychological Association (APA), Society for Industrial and Organizational Psychology (SIOP), and International Test Commission (ITC).





## Scope of Services

### Due Diligence

CarterBaldwin verifies candidates' academic credentials and conducts an in-depth internet search to investigate any publicly available controversy. Once the finalist is identified, the second round of due diligence occurs, as 2-3 references are obtained. Additional background investigations may proceed, according to our client's hiring practices and policies. We also use the Predictive Index™ assessment as a complement to our interviewing, credentialing and referencing process.



### Negotiation and Offer Process

CarterBaldwin establishes early ground rules with the finalist regarding compensation. We directly assist in the offer extension and negotiations to facilitate a positive conclusion for all parties.

### Finish Well and Remain a Friend

As the search progresses, it is important to close doors with the same level of professionalism with which they were opened. Only one candidate will be appointed for the position, but the search will touch dozens and often hundreds of people. Giving disappointing news is never easy but giving it timely and professionally allows for positive relationships.

### On Boarding

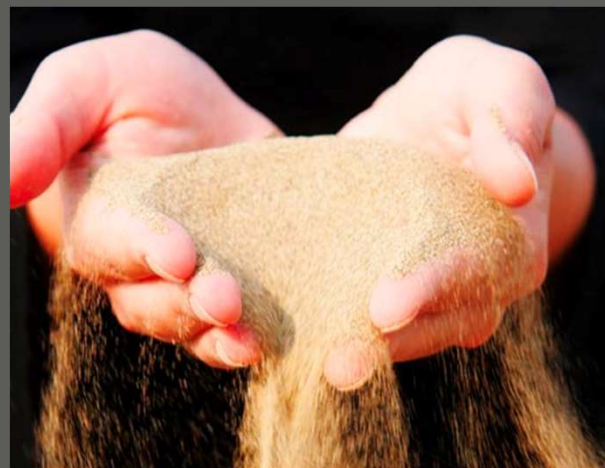
CarterBaldwin continues to remain close to our client and selected candidate even after the search is complete, with in depth conversations and feedback at 30, 60, 90, and 180 days.

Every part of our process is built to maximize the likelihood of predictable success. We are eager to adjust any step in the process to the specific needs and requirements of our clients – a corporate value we call “flexpertise.”

# Our Core Values



**We are Positive People**



**Time is Precious**



**We Strive for 100% Trust**



**We are Serious about Results**



**We are Energized by Learning**

# Our Core Values

## We are Positive People

We are constantly looking for solutions versus excuses. We look for ways to lift each other up, especially when faced with challenges. Because energy is contagious, we try to be a source of positive energy for each other, always. Our work is serious, but we do not take ourselves too seriously. Our differences, properly understood, produce camaraderie. Achieving great results gives us the right to be light-hearted.

## Time is Precious

Time is a limited resource for everyone. For that reason, we strive to be incredibly respectful of everyone's time, both inside and outside the company. Speed is a hallmark of our delivery to the client. There is a time to work to be professional and intentional. Being careful with time at work allows us to enjoy time away from work. We are anti-crastrators and look for ways to complete tasks early. We strive for chronological compression, squeezing out the empty, unfruitful spaces between tasks.

## We are Serious About Results

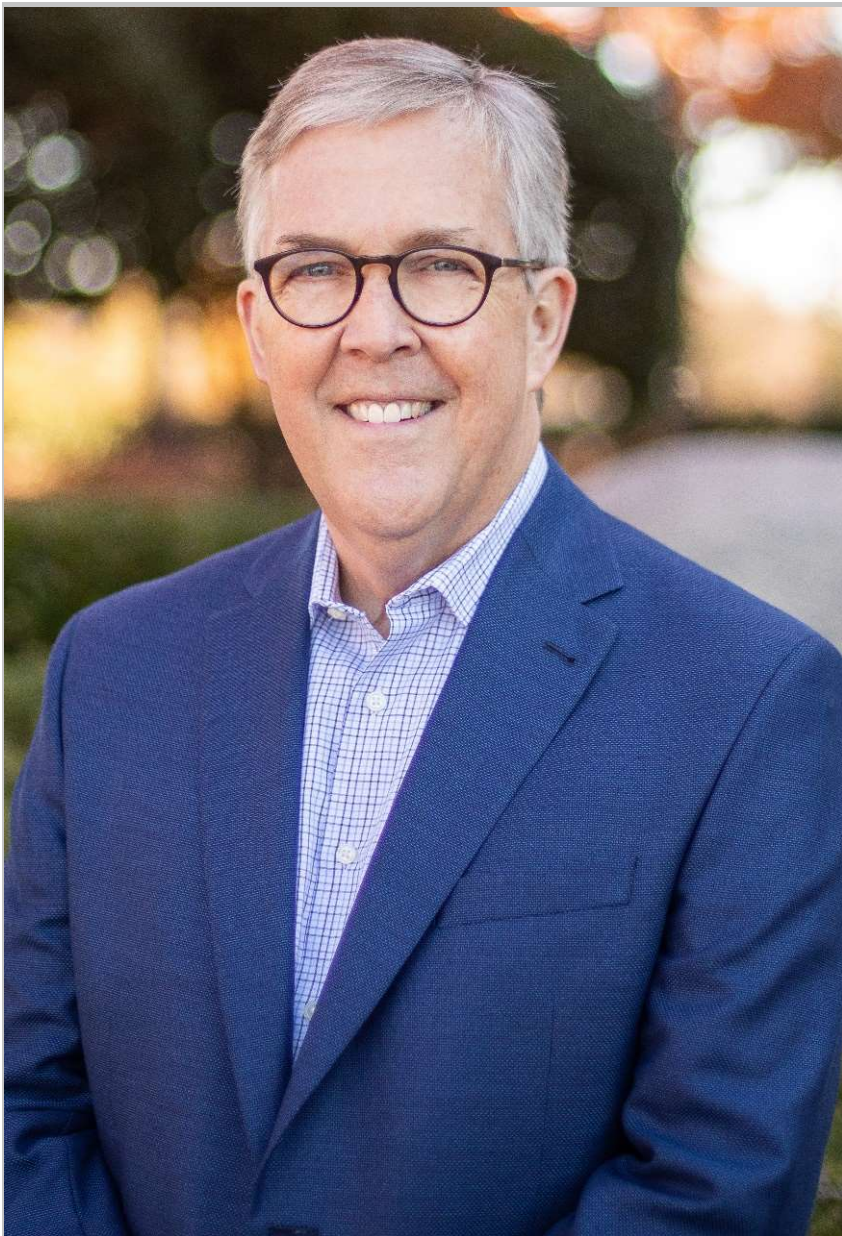
Results matter! We are focused on the outcomes achieved, not on the effort or the time. Our clients hire us to execute difficult searches, and we do what it takes to give them a great outcome. Because we are focused on results, we don't pass the buck. When faced with challenges, CarterBaldwin and its people adapt and overcome as the path to success. Both CarterBaldwin and the client have to win. We see challenging searches as an opportunity to innovate.

## We Strive for 100% Trust

100% trust means that 100% of the time we can count on each other to tell the truth, to never withhold relevant information and to have each others' best interest at heart. This allows each of us to spend zero effort in guarding our individual best interest. We are ridiculously honest in the best interests of the other person and the company. There is a great chasm between 99% trust and 100% trust that we work every day to keep from opening.

## We are Energized by Learning

We are an intellectually curious bunch. We understand the need to learn and evolve to continue to thrive. We embrace continuous learning — about our clients, the markets they serve, the challenges they are facing — and about ourselves. We are obsessed with learning and growing, and humble about the fact that we don't know it all — but we are confident that we can help each other “figure it out.” We love engaging with each other and our clients, wrestling with challenges, and coming up with the best solutions to their needs. There is always more to learn. We are energized by that process.



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## Jack Hall

Partner

Jack's understanding of and affinity for independent K-12 schools are grounded in a lifetime of experience in the space - first as a boarding school student, then as a teacher, coach, administrator, head of school, and trustee. He joins CarterBaldwin from The Walker School, where he was Head of School from 2011-2022, overseeing the school's largest capital campaign and spearheading the New Avenues Immersive Dyslexia Program.

Jack previously spent twelve years as Head of School for Augusta Preparatory Day School and eleven years as a teacher, coach, and administrator at The Westminster Schools in Atlanta. In addition to his experience teaching, coaching, and leading, Jack served as chair of the Head of School Search Committee and Board Chair at The Stony Brook School, giving him yet another valuable perspective on school leadership and governance.

Jack holds a BA in Theatre from Davidson College, an MS in Athletic Administration from Georgia State University, and an MA in Education Administration from Columbia University, where he was a Klingenstein Fellow. Jack and his wife, Cathy, have been married for more than 35 years and have two adult children and two grandchildren. A native Atlantan, Jack is an avid Braves fan, dedicated Sunday School teacher, loves working in the yard, and always looks forward to time on the lake or in the mountains with family.



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# Chris Hornsby

Partner

Chris leads CarterBaldwin's faith-based K-12 education practice, where he conducts Superintendent, Head of School, and President searches for independent Christian schools, both traditional and Classical, educational ministries of churches, and university-model Christian schools. Through his work with nonprofits, colleges and universities, K-12 schools, and their leaders and boards, Chris knows firsthand how the right leader can transform an organization. He has developed a broad network of professionals within these verticals and gained a deep understanding of the unique challenges and opportunities their organizations face. With this industry insight, Chris is able to ask the right questions, identify the right candidates, and provide the right counsel to clients through all phases of a leadership transition.

Prior to CarterBaldwin in 2015, Chris was Director for a leading national recruiting and consulting firm and was responsible for building new strategic partnerships with national clients in the healthcare IT arena. Earlier, Chris was Executive Director of Radical Mentoring, a nonprofit that leverages the life experience of more senior professional men to mentor younger men in intentional small group settings. Under Chris's leadership, Radical Mentoring adopted a web-based model that expanded their global footprint and scale significantly.

Chris began his career at a start-up software company, selling to university systems, for-profit training centers, and corporate entities. The company was ultimately sold to Kaplan, a worldwide leader in certification and test preparation, assessment, and learning services. Following the acquisition, Chris's role expanded to Regional Director of Sales, where he continued to sell software solutions into the education market.

Chris holds a BBA in finance from the University of Georgia and serves as a trustee for Mount Pisgah Christian School in Johns Creek, GA and is an advisor for The 3:15 Project. With three elementary and high school children, Chris and his wife, Shanna, are always on the move. When he does get a free moment, Chris enjoys outdoor sports, cooking, and exploring Atlanta's great restaurants.