



## POSITION INFORMATION FORM

### 1. ORGANIZATION INFORMATION

- |  |  |
|--|--|
| A. Contact name(s) / Title(s)                                | G. Short and long term strategies            |
| B. Organization structure                                    | 1. Acquisition plans / Diversification plans |
| C. Key Executives (background, edu. etc.)                    | H. Number of employees                       |
| D. Sales, revenues, earnings (historic, current & projected) | I. Other pertinent company information       |
| E. Principal competitors                                     | J. Description of organizational culture     |
| F. Competitive position within industry                      | K. Human Resources internal contact          |
|  | L. Recruiting packets                        |

### 2. POSITION INFORMATION

- |  |  |
|--|--|
| A. Position(s) title   | G. What are other responsibilities to be assumed?                            |
| B. Why position(s) open  | H. What are, if any, opportunities for other responsibilities in the future? |
| C. To whom will Incumbent report (name, title, experience, responsibilities) | I. Extent of authority and budget/P&L accountability                         |
| D. Who directly reports to Incumbent and who are principal associates?       | J. What problems will Incumbent face?  |
| E. Description of Incumbent's Department                                     | K. What are the measures of success for this position?                       |
| F. What are the immediate challenges?  |  |

### 3. IDEAL CANDIDATE INFORMATION

- |   |  |
|---|--|
| A. Education                                | D. Specific professional requirements            |
| B. Experience (type, level, minimum amount) | E. Personal characteristics required for success |
| C. Competencies required                    |  |

### 4. COMPENSATION CONSIDERATION

- |   |  |
|---|--|
| A. Range of base salary                                       | E. Employment contract//non-compete  |
| B. Formula for incentive (short term) comp                    | F. Fringe Benefits (i.e., healthcare, retirement, car, cell phone, club memberships, etc.) |
| C. Formula for deferred (long term) comp                      | G. When reviewed (annually, semi-annually)   |
| D. Stock Option or other form of equity participation program | NOTE: See ColumbiaSelect Compensation Review Form  |

### 5. RELOCATION POLICY

- |                                   |                               |
|-----------------------------------|-------------------------------|
| A. Real Estate fees-Closing costs | D. Family house hunting trips |
| B. Temporary living expenses      | E. Mortgage assistance        |
| C. Movement of household goods    | F. Home purchase              |

### 6. WORLD OF CANDIDATES

- A. Likely target organizations
- B. What should Candidate be doing if in target company
- C. Which companies are off-limits (due to client's negative bias or for any other reason)

### 7. INTERVIEW AND SELECTION PROCESS

- |  |                                |
|--|--------------------------------|
| A. Names / Titles of interviewers          | D. Who are key decision makers |
| B. Backgrounds                             | E. Selection process:          |
| C. Responsibilities Role of ColumbiaSelect | 1. Role of ColumbiaSelect      |
|  | 2. HR/Hiring Mgr./Board        |

### 8. COMMUNITY INFORMATION

- |  |   |
|--|---|
| A. City in which position is located               | C. Housing facilities                           |
| B. Where do most of his/her fellow executives live | D. Characteristics and attractions of community |
|  | E. Location recruiting package                  |