



12 Steps to a Successful Search

Considering a search for a new CEO or Executive Director? In response to many requests, BoardWalk Consulting has prepared a template to guide you through the **12 Steps to a Successful Search**.

Step 1: The Impetus.

Whether the search is planned or sudden, there are immediate issues of transition management and communications that have to be handled with special care.

In devising an exit strategy, absent blatant malfeasance or a precipitous departure by the outgoing CEO, the board should carefully balance respect for the outgoing CEO with respect for the ongoing needs of the team, the mission and the organization. Of special concern to all is the role the departing CEO will have in three critical areas:

- The ongoing management of the enterprise during the search
- The selection and integration of a successor, and
- The management of communications to constituencies and stakeholders about the impending change.

Step 2: The Committee.

The selection of a search committee is often second in importance only to the actual selection of the next CEO.

- The committee chair should be someone other than the board chair--a buffer is useful for tactical purposes, the appearance of an inside job is minimized, and a future board leader benefits from a wonderful developmental opportunity.
- Committee size will affect the quality and pace of deliberations. Most experienced trustees suggest a committee of 5 to 7 members. A smaller committee can inhibit the free flow of ideas, whereas a larger one will add real complexity to issues of process management. Usually, availability of a candidate is not a problem in a well-crafted search, but availability of search committee members often is!
- The committee should have a formal mandate from the full board; we encourage boards to request a specific hiring recommendation from the search committee. The board can always reject the committee's recommendation, but requiring the committee to present a *slate* of candidates for the full board's evaluation will add at least a month or two to the process--and very little to the outcome.

- Staff members deserve a voice but rarely a vote. Staff input on the direction of the search and the selection criteria for hiring can be enormously helpful, but we respectfully disagree with those who say staff should have a vote on the selection itself. The opportunities for conflict are rife when a subordinate is asked to choose his or her future boss, and the prospect for real candor among search committee members is thereby diminished. There are exceptions, of course--academe comes to mind--but on the whole we counsel against giving subordinates a formal vote on the selection committee.
- Committee members should be willing to serve as mentors to the new CEO, since they will have had more contact with (and therefore more investment in) the selected candidate than other board members will have had. Accordingly, search committee service should not be the final act of a departing board member but rather a statement of commitment to ongoing involvement in the enterprise. Candidates will expect such commitment, and your new CEO deserves it.

Step 3: The Ground Rules.

The primary ground rules for a search revolve around the common courtesies of *respect* and *confidentiality*. That deliberations of the search committee must be in strictest confidence is sacrosanct; there is simply no faster way to kill a good search than through leaks of private information. If sunshine laws in your area require disclosure of certain information at certain stages, then publish the rules for all to see and stick with them.

Respect shows up in numerous ways: Answering every inquiry promptly, managing an efficient process, providing appropriate feedback on a regular and timely basis to all players (prospects, candidates, and internal and external stakeholders). The key, we think, is to approach the process with an *attitude of gratitude* rather than one of entitlement--"Thanks for your interest," "Thanks for your time," "Thanks for your counsel," even "Thanks for your patience!"

Step 4: The Resources.

As in so many other cases, *time*, not money, will be your scarcest commodity, and thus we counsel clients to be realistic in setting a budget for the project schedule. Unrealistic expectations can torpedo even the most careful CEO recruitment exercises, and leadership change has a way of promoting unrealistic expectations (the new CEO will *not* make up for all the foibles of the predecessor and can be counted on to arrive with a whole new set of baggage!). Money is important, of course, to offset costs of any interim leadership you may need and to pay recruitment expenses, whether or not you retain a search firm. One cost can be surprisingly large: relocation.

We find that the biggest costs in a search are often hidden: *Impatience* and *modest aspirations*. A deliberate sense of urgency is fine, but impatience gives rise to a tough question: "Why did we not have enough time to do it right but plenty of time to do it over?" Modest aspirations may cause you to overlook a far better candidate, thereby creating opportunity costs all their own.

Step 5: The Search Firm.

Whether or not to use a search firm to support the recruiting process is a major decision. Since hiring a CEO is likely a nonprofit board's biggest decision, we recommend utilizing all available resources to ensure a compelling hire. Few corporations of consequence would undertake such a process without professional assistance, and more and more nonprofits realize their missions and their stakeholders deserve a comprehensive, professional search.

In evaluating use of a search firm, consider the following key issues:

- Which offers the best value to the organization, the obvious costs of a full search or the hidden costs of going it alone?
- Should we rely on search professionals we already know, or is a more formal RFP process called for? (Note that RFPs take more time for everyone involved but may uncover compelling resources you might otherwise have overlooked. Just be careful not to get too bureaucratic in the review!)
- Given alternative search resources, which consultant or firm will make the best working partner for us? Which will be the best ambassador for the organization
- Does the consultant offer a process that is both accountable and transparent?
- Does the consultant share our passion for the cause?
- Does the consultant have the time, the competence, and the commitment to give our search the resources it deserves?

Note: The use of a search firm does not absolve the search committee of the board of its responsibility for the process. This is why the working relationship with the firm is so key: You want a consultant who will handle your search, your candidates and your reputation *at least as well as you would yourself*.

Step 6: The Specification.

No document you prepare will be as important to a successful search as will your summary specification. It should represent the committee's (and, by extension, the board's) shared vision for the organization, and it should be the benchmark against which final candidates are evaluated.

The specification is a marketing tool, not a personnel document, and thus it should be both inviting and aspirational. Most "spec sheets" developed internally

go on at length about requirements without ever mentioning why the ideal candidate would be attracted to the role in the first place. If your summary does not answer the core question, "Why would I want to work here?" then your specification needs serious redrafting.

A final note on specs: They should reflect consensus, not necessarily unanimity. The details are important, to be sure, but the sweep of the document is key. If every member of the search committee can endorse the document with his or her signature even while holding reservations about this line or that, then your document is likely a good one, as long as it does not duck tough issues that the organization has not addressed.

Step 7: The Research.

A successful search hinges on a compelling candidate pool; otherwise, the basis of comparison is faulty. It is rare that a thoughtful, methodical search results in a bad choice. The real risk is the better choice that was overlooked. No search is truly exhaustive, despite the standard claims, but every search can be comprehensive. The definition of "comprehensive" will depend on the context of your particular challenge. If the scope of your search is at least two significant degrees larger than the scope of your services, your markets or your stakeholders, you are probably in the safe zone. Neighborhood groups rarely need to recruit from 500 miles away, but all organizations deserve an effort that goes beyond the obvious targets.

The key is research, and the core process is outreach.

- Who shares (or could be led to share) a vested interest in the success of our organization?
- Where do our collective spheres of influence overlap?
- Where are the centers of excellence in our field?
- What organizations have already succeeded at the sort of things we're trying to do?
- Who led those organizations to success?

One obvious resource many organizations overlook is the networks represented by their core supporters-- board members, donors, constituents, partners. Forget six degrees of separation; if you could just tap the networks already known to your organization's best friends--that's just two degrees-- you will already have access to an extraordinary pool of talent.

Step 8: The Candidates.

We believe that *everybody* we meet in the course of our work is a potential candidate or a potential source of candidates. How you treat such people will have a major influence on the quality of your outcome:

- Are we responsive to all inquiries?
- Do we follow up on all outreach calls and interviews?
- Are we honest with candidates about our process and its timeline?
- Do we say "No" gracefully?
- Do we say "Thanks" consistently? (An attitude of gratitude is a powerful recruiting tool.)
- Have we made room for creative solutions?
- Do we understand that there are no perfect candidates, that each contender represents a trade- off against the ideal?
- Do we know which trade-offs we can live with and which we cannot?
- Do we treat every candidate with same respect we exhibit with potential donors, partners, constituents or board members?

Step 9: The Interviews.

If you have followed our suggestions to this point, you know that interviews are not the be-all-and-end-all of recruiting that most people think. Said differently, interviews can be the most misleading part of the process, since by their very nature interviews tend to favor those with the best packaging, the best presence and the best verbal skills. Not every senior candidate is equally blessed, and the one with the most charisma may not in fact be the best choice for the role.

A truly effective interview process will level the playing field for all candidates, minimizing the advantage of individual salesmanship and maximizing the opportunity for both candidate and organization to judge the potential fit each offers the other.

Whole books have been written about the interviewing process. Here, we offer a few pointers meant to help set your organization apart from so many others whose process often ranges from ineffective to offensive:

- **Off-site.** Whenever possible, hold your initial interviews at a neutral location away from your normal workspace. Serious candidates will want to see your organization in action, of course, but the first session is meant to whet appetites for further discussions, not answer every question that you or the candidate may have. By putting distance between your interviews and the normal distractions of your day, you will reinforce for your candidates and yourself the seriousness of the task at hand.
- **Moderated.** Most clients find it useful to have a third party on hand to help keep the discussion balanced. Otherwise, the risk is that you or the

- candidate will monopolize the discussion (inadvertently, we trust), and one of you will leave disappointed. Your search consultant can fulfill this role, as could a board member or another member of the senior team.
- **Compressed schedule.** To have a valid basis for a hiring decision, you will want to interview at least three or four candidates for the role. To keep the process moving and to help cement the basis for comparison, we *strongly* recommend that all interviews take place within a day or so of each other. Not only is the process more efficient for the organization, it is also more respectful to your candidates, as no one is left hanging while other interviews are taking place. After all, everyone you interview is a potential supporter, whether you hire them or not, and a quick decision will help cement a positive impression with all contenders.
- **Balanced.** It's important to remember that both parties to the recruitment process are buyers and sellers in the transaction. Too often, organizations treat candidates as mere jobseekers, erroneously assuming that there is no competition for a given candidate's attention. Respectful interviewers construct a balanced session with full give and take. They pay as much attention to a candidate's questions as to their answers, making equal time for both.
- **Prompt feedback.** We know of too many recruitment efforts that failed for lack of attentiveness to the feedback process. Candidates are customers too, and they deserve prompt feedback. The sooner you close the loop, the sooner you can move on to even more substantive discussions with your favored finalist.
- **Watch the implicit messages.** Everyone is on good behavior during the courting process, and yet the cues to the future working relationship are plentiful. If your feedback is prompt, the candidate will infer an attitude of respect. If your questions are thoughtful, timely, relevant and specific, candidates will infer intentionality and seriousness of purpose. If you are distracted, late or hurried, candidates will draw different conclusions.

Step 10: The Follow-up.

- **References.** The safest predictor of future performance is past performance, and there is no substitute for thorough referencing. Difficulties abound, as savvy employers are sensitized to legal risks in candid references, but comprehensive references are essential to the hiring process. Incidentally, the best information often comes from peers, subordinates, clients and constituents. Immediate bosses may have more difficulty being forthright about the very things you most need to know in order to make the best use of the talent you are about to hire. The ultimate question? "Would you rehire this person?" and if so, "How would you change the way the person was managed?"
- **Second visits.** No serious candidate for a senior role will expect—or accept—an offer based on one interview. Second and third interviews offer

- both parties the opportunity to expand their knowledge of the role, the issues and the likely fit. Since chemistry, not competence is the main reason hiring decisions become hiring mistakes, use multiple visits to build a foundation for the future relationship.
- **Spouse's (or partner's) role.** Your new executive will be fully engulfed in new responsibilities, but a trailing spouse may be at loose ends. Especially if your candidate will be relocating for the new role, recruit the partner as carefully as you recruit the candidate. The costs will be modest but the benefits very real.
- **Expectations.** As soon as the right level of trust has been established, be open about your expectations regarding such matters as compensation ranges, decision processes and start dates. A little clarity at the front end can help minimize disruption later.
- **Manage the schedule.** Similarly, be forthright about the time it will take your organization to work its way through the recruiting and hiring process, and candidates will be more open about time pressures they may be under.

Step 11: The Hire.

- **Term sheet.** Lay out in one document the business terms you are contemplating, and you will have far fewer surprises to deal with later. These are not legal documents per se—that is, they may not constitute a formal offer—but they do set the tone and parameters of the business agreement (and, if a contract is required, they form the basis for the lawyers' subsequent deliberations). For even the smallest organizations, huge surprises may lurk in the most straightforward issues—relocation costs, for example—and last-minute negotiations can prove costly to both parties. It's not critical that every detail be nailed down—bonus benchmarks, for example—but it is important to define the process by which such matters will be settled.
- **Agree to agree.** The sooner you and your final candidate can reach an agreement to agree, the sooner you will establish the character of your working partnership. In very complex situations, an agreement to agree can facilitate a term sheet which can facilitate a detailed offer.
- **Formal offer and acceptance.** The form and substance will vary from organization to organization, but we think process matters a great deal. We have seen organizations take three months to make an offer and then expect a candidate to respond the same day. Our bias is not to make an offer until we know it is going to be accepted, a process that is mutually respectful and mutually reinforcing.
- **Announcement protocols.** A major hire is cause for celebration for both parties, and both the organization and the candidate should have a hand in the timing and substance of any announcement. Respect for existing relationships is key. Your own board members, the candidate's colleagues,

- other candidates on the search, the new hire's new peers and subordinates—all require individual consideration when the news is conveyed. *Note:* How a candidate handles the transition from the current employer will presage how that candidate will handle responsibilities with you.

Step 12: The Transition.

- **The ramp-up.** The start of any new hire represents an opportunity to advance the cause, celebrate the mission, honor the progress and solidify the support. It can also be a time full of confusion, mixed signals and rumor. How you manage the ramp-up to your new hire's start date can have outsized implications for the hire and the organization. The fewer details you leave to chance, the smoother the transition will be, and the more likely you are to move from success to success.
- **Mentors.** Who can best serve as the new executive's mentors during the early phases of transition? Often, members of the search committee fill the role most comfortable, but perhaps your organization is blessed with an elder statesperson—a retired board member, perhaps, or a long-serving deputy totally committed to the collective good—who is well positioned to offer counsel and support as your new appointee navigates the new challenges and relationships. The goal here is an honest broker, a candid sounding board, and a keeper of confidences with whom the new executive can be fully candid.
- **Staff relations.** Staff expectations can have as much to do with a new colleague's success as actual performance does. Did the staff have a voice in the selection criteria or even the selection itself? Is the rationale behind the final choice as obvious to peers and subordinates as it is to the group who made the actual choice? What preparation have you and the new executive undertaken to ready the organization for the leadership change?
- **The first 90 days.** These are so important to the new executive's success that a Harvard Business School professor has written the book: **The First 90 Days: Critical Success Strategies for New Leaders at All Levels**, by Michael Watkins. It's available on BoardWalk's website or at any major bookstore. For new hires at the top of an organization, we suggest it as required reading by the executive, the mentor and the board chair.

If you have other specific items to suggest as an essential step in a successful search, we would like to hear from you. Please email info@boardwalkconsulting.com with your comments.