

An aerial photograph of a meeting taking place around a large, curved wooden table. Two people are visible: one in a red shirt is writing on a document, and another in a purple shirt is looking at a laptop. The floor is made of dark grey tiles.

The role of the search committee in leadership transition

The selection of a new leader is an exciting and significant time in the life of any nonprofit organization, whether an academic institution, an association, or an arts, culture or philanthropic entity. Leadership transitions present a time to reflect upon future direction, vision, priorities and culture. The search committee plays an important role in leading this transition, often representing the perspectives of key stakeholders in determining a search strategy that will yield candidates that reflect the priorities, capabilities and cultural fit likely to produce sustainable results for the institution.

Spencer Stuart consultants have worked with numerous search committees and candidates, many of whom have shared their perspectives and experiences with us, including best practices regarding search committee effectiveness and candidate care. While every leadership search should reflect the culture of its organizational values, we have compiled this guide to provide advice on general best practices to manage an effective and efficient search process. We fully understand that nonprofit organizations aspire to have a search that yields a diverse pool of candidates and results in a long-term leadership solution that is respected internally and externally.

Building a strong foundation

A diverse, well-run search committee can help the organization identify a wide pool of candidates and increase the likelihood that the successful candidate will be embraced by its diverse constituents. Key to the committee's success is a strong foundation.

Committee formation and composition

A search committee's composition can vary widely from organization to organization, depending on culture and other factors. Some search committees are essentially committees of the board; other times, they include representatives from a wide variety of stakeholders. Academic institutions, in particular, often have policies establishing the specific representation of their search committees, while associations often include representatives from various sectors of their membership. It is helpful to keep in mind a few considerations when forming a search committee:

- » **Committee size.** We have found that it is best to keep the search committee as nimble as possible. Many search committees function best with six or fewer members, while other organizations may have 12 or more members to adequately reflect their constituents. A search committee should be small enough to allow members to participate in every step of the process, and large enough to ensure buy-in for its recommendation. Keep in mind that the larger the committee, the more difficult it becomes to schedule key meetings and calls and to reach consensus on candidate recommendations.
- » **Institutional culture.** Search committee composition should be representative of the stakeholders the organization serves. Academic medical centers, for example, might include faculty, hospital and student representatives on the committee for a dean search. Associations with chapter or affiliate groups may include a representative from those communities on the committee. International NGOs may wish to include stakeholders who represent distinctly different cultural or regional backgrounds. Regardless of which stakeholders they represent, all committee members should view themselves as serving the interests of the institution and all stakeholders, rather than a specific constituency.
- » **Mix of new and long-time members of the organization.** Individuals who have been involved in the organization for many years bring a historical perspective on past decisions, but we also recommend including the viewpoints of individuals who are newer to the institution and/or rising leaders, who represent its future.

The search committee's mandate

The committee's charge can vary broadly: from recommending several "qualified" candidates, from whom the hiring individual or board will choose; to providing a ranked list of top candidates; to recommending a preferred option. The best practice is to present the board or hiring manager with a single recommendation, unanimously endorsed by the search committee. Regardless of the approach, the charge needs to be clearly understood by all participants at the outset of the search, and the search consultant should ensure the committee carries out its charge.

A clear and agreed-upon position specification

A well-defined position specification serves as a guide in the selection of the new leader and helps ensure that the process attracts the most appropriate field of candidates. Through a series of structured interviews with committee members and a reasonable sampling of a cross-section of the organization's constituents, your search consultant will identify areas of agreement — and disagreement — in the expectations about the position and capabilities required for the role. The search committee, guided by the search consultant, must then come to consensus on a position description that accurately captures the skills, style and cultural requisites for success. Ideally, the search committee will focus on the major position requirements, and leave the “wordsmithing” to the search consultant.

As the search progresses, committee members should hold one another accountable for remaining aligned with the position specification. It is not uncommon for search committee members to “connect” with a charismatic leader who may possess less substance than other candidates. The search committee can off-set the power of charisma by taking time to get to know the candidates, reflecting on how candidates compare to the desired capabilities, experience and culture style for the role.

Oversight by a strong, engaged chair

In our experience, one of the most important elements of a successful search — if not the most important — is the search committee chair. The ideal search committee chair is someone who is viewed as an impartial leader committed to pursuing the best interests of the organization — and someone who is able to dedicate the time to the process. The most effective committee chairs do the following:

- » Run an open, transparent process
- » Regularly update the board or hiring executive on the status of the search
- » Ensure that all committee members participate in discussions
- » Serve as the arbitrator of disagreements among members, when necessary
- » Facilitate the transition of the new leader

A voice, not a vote

The role of the outgoing leader

The retiring or outgoing leader can provide valuable counsel at many points in the search process, but ideally maintains an arm's length distance from the search process and the committee. For example, the role of outgoing leader may include:

- » Providing helpful input about potential members of the committee, but not serving on the committee
- » Suggesting search firms for the committee to consider, without being involved in the selection
- » Making time to meet with finalist candidates, assuming the search committee agrees
- » Helping the organization stay calm and focused on its work as the search proceeds
- » Supporting the new leader in a smooth transition



Managing an effective interview process

The purpose of the candidate interview is to allow the search committee to get to know each person and determine whether he or she has the skills and experience to do the job, and will be a good cultural fit. Keep in mind that the interviewing process is a two-way street: as much about selling your organization as assessing the individual candidates. One area that can quickly impact a candidate's image of your organization is a poorly managed interview protocol. Highlighted below are several best practices for effective interviewing.

Establish a search calendar

Because search committees typically conduct group interviews with each candidate, advanced scheduling is critically important to an efficient process. Reserve dates on everyone's calendar for committee meetings and candidate interviews very early on. Reserving these dates in advance ensures that all or most committee members will be available for interviews and keeps the search moving forward, as weeks can be lost trying to schedule interviews once promising candidates are identified.

Maintain a disciplined interview protocol

It is common for a search committee to meet with four to six candidates in a day, so it needs to make the most of its interview time and avoid awkward encounters among the candidates. Your search consultant should provide an interview protocol for orchestrating interviews in an organized and professional manner that allows committee members to drill down on the critical capabilities for the role in a consistent fashion with each candidate. This enhances the group's ability to compare and contrast impressions, insights and feedback.

Focus interviews on the critical criteria

Typically, the search consultant will put together a list of predetermined questions that are tailored to the requirements of the position. Candidates should be asked to demonstrate their abilities in the context of specific experiences they have had (what they have done, not what they would do). Their responses also will help reveal their leadership styles, including their approaches to working in teams, sensitivity to internal politics and openness to others' opinions. It may be helpful to assign one or two individuals on the committee to ask follow-up questions based on the candidate's presentation and to field questions from the candidate. By reading the materials prepared by your search consultant in advance of interviews, you can make the most of your limited time with candidates. If the discussion starts to "wander," the chair should help put it back on course. Remember to build in ample time for the candidate to ask questions — they are evaluating your institution as much as you are evaluating them.



Bring finalists back for a second interview

In a typical, well-run process, the search committee will winnow a field of four to six candidates to two or three front-runners during the first round of interviews. It is not uncommon for committee members to feel strongly in favor of one of those candidates, and some committees are tempted to make their recommendation at that point. However, a second round of interviews with the finalists is an essential step in the search process and should not be skipped. Second-round interviews, which often include the candidate making a presentation based on a “homework assignment,” allow the committee to get to know candidates better, including their ideas for and questions about the organization. These discussions allow committee members to surface and address any lingering concerns or questions about the candidate’s suitability, fit, interest and/or ability to relocate.

Debrief after the interviews

The search consultant’s goal is to capture committee members’ feedback on candidates as quickly and comprehensively as possible. While the purpose of the first round of interviews is to identify candidates who the committee wants to get to know better, the second round is meant to narrow the field to, ideally, a first choice and a back-up. After second-round interviews, plan on discussing committee members’ impressions of the candidates, their suitability for the role and fit with the organizational culture. This exercise can take various forms. Some committees use a scoring sheet to rate each candidate against the requirements of the position specification. The chair also can ask search committee members for top-line feedback about what they liked, what they are less sure about and any serious concerns that the search consultant may be able to address through further referencing.

Maintain the confidentiality of discussions

Search committee members need to agree to have an open dialogue, but information about individual candidates must be contained within the committee. Any status updates about the search should be shared with the board in an agreed-upon format without breaching confidentiality. Such breaches can limit the candidate pool and risk losing strong candidates who will drop out if they are prematurely exposed. The committee should discuss whether, how and at what point to bring in constituencies such as staff, foundation members or representatives of the student body so that they feel engaged in the process and are comfortable with the result. Also, committee members should resist the temptation to do their own reference checks within their networks; even casual conversations about potential candidates outside of the committee increases the risks for individuals and the reputation of the institution.

The search consultant is responsible for driving the referencing process, although search committees often prefer to do some referencing themselves. Regardless of who conducts them, reference checks should be done at the appropriate time and in a discreet manner. Committee members should resist the temptation to reach out to contacts at a candidate's current or former organizations without the candidate's agreement. Word that an individual is interviewing can spread quickly, which can cause candidates to withdraw from the process and/or put their current position at risk.

Ensure an even playing field for internal candidates

The search committee should display no bias in favor of — or against — internal candidates. Experience suggests that when a very strong internal candidate who meets the position specification is available and the leading external candidate is not measurably better, many institutions favor the internal candidate. Conversely, we strongly recommend against bringing in internal candidates who are not seen as viable for what is essentially a courtesy interview. When this happens, expectations are raised, and candidates experience an even bigger disappointment if they feel their candidacies were not taken seriously.

Avoiding the search pitfalls

An ineffective search committee and process can cause delays, deter potential candidates and fail to recruit the individual best suited for the organization. Here are the most common pitfalls.

Unrealistic expectations about the candidate pool. Setting unrealistic expectations about the experience level or professional background of potential candidates can set the committee up for difficulties later if these individuals do not materialize. Everyone believes his or her institution or organization is the best, but location, the compensation level or the scope of the role may make the position less interesting to some candidates. Work with your search consultant to understand the likely pool of candidates and the prevailing trends in compensation; the search consultant will develop a search strategy to attract the best, most qualified and most appropriate pool of candidates, given these factors.

Delays in the search process. If a search drags on too long, the most promising candidates may decide to pursue other opportunities or begin to view the organization as indecisive or disorganized. Commit to making the search a priority and moving the process along in a timely manner.

An ill-defined position specification. Going to the talent market with a position specification that is ill-defined or does not have the buy-in of the full search committee can needlessly delay progress, as more and more candidates must be brought in to match requirements that have become a moving target. Spend enough time at the beginning of the search to adopt a position description that reflects a clear sense of the organization's mission and the requirements of the role, and then hold one another accountable for evaluating candidates based primarily on those priorities.

Competing perspectives. Recognize that it is inevitable that members of the search committee will have multiple agendas and, often, it is the first time that the group has worked together. It takes a certain amount of time and maturation of the committee to allow members to get into sync. The search committee chair can help this process by encouraging thorough, thoughtful discussions that allow divergent perspectives to be heard, but still drive the process along.

Serving on a search committee is both a responsibility and a privilege. The vast majority of committee members believe their service is important both to the institution and their own professional development. With the support of an engaged chair and the assistance of your search consultant, committees evolve from a group of highly invested, diverse stakeholders to a high-functioning transition team whose service often continues through the onboarding and orientation process for the new leader. Often, new relationships are developed and old ones strengthened, and committee members gain new insight into their institutions and the talent marketplace. Importantly, committee members conclude their service knowing that they played a major role in selecting a leader for their organization's future.




ABOUT SPENCER STUART

At Spencer Stuart, we know how much leadership matters. We are trusted by organizations around the world to help them make the senior-level leadership decisions that have a lasting impact on their enterprises. Through our executive search, board and leadership advisory services, we help build and enhance high-performing teams for select clients ranging from major multinationals to emerging companies to nonprofit institutions.

Privately held since 1956, we focus on delivering knowledge, insight and results through the collaborative efforts of a team of experts — now spanning 56 offices, 30 countries and more than 50 practice specialties. Boards and leaders consistently turn to Spencer Stuart to help address their evolving leadership needs in areas such as senior-level executive search, board recruitment, board effectiveness, succession planning, in-depth senior management assessment and many other facets of organizational effectiveness.

For more information on Spencer Stuart, please visit www.spencerstuart.com.

A person is sitting on a large, light-colored wooden barrel in a room with light-colored tiled floors. The person is seen from behind, wearing a light-colored top. The barrel has a circular opening at the top, through which a bright light is shining, creating a strong glow. The background is a plain wall with a grid pattern of tiles.

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