

Careers + Leadership: Conducting an Executive Director Search *The Top Six Imperatives for a Non-Profit Board*

By Chuck Pappalardo, Managing Director

Once it's clear that a new Executive Director is necessary, the search begins—first for the ideal recruiting firm and then for the ideal individual. As a Board, you direct the activities and manage everyone's expectations along the way. The following six recommended steps are critical to your success in finding the candidate to effectively lead your organization.

Establish a Search Committee that Reflects the Board's Strengths

When establishing the search committee, the first individuals on your list should be the Chair and possibly the Vice Chair. You want to send a message to your search firm and your candidates that the search is important enough to require the time of the highest members of the Board, who expect to share deep common ground with the ultimate candidate. The others on the committee should include the hardest-hitting, committed individuals, provided they are able to attend the weekly progress calls. Do not consider inviting an employee to the search committee, no matter how much you regard his or her ideas and intellect. This practice rarely goes well as the employee's input often has an associated agenda. If your search committee is large or geographically spread, it isn't necessarily important that each committee member conduct an initial interview with each candidate, but it is important that the search committee leaders do, namely the Chair and Vice Chair.

With this core of search committee members, you can develop better questions and a yield better result—not to mention that the search firm and search candidates gain direct clarity about the personality of your organization.

Put a High Priority on Creativity When Choosing a Search Firm

There is a range of operating search firms, all qualified in some manner to recruit good candidates for their clients. The challenging step for your Board is to identify the firm that's right for your organization. Under the guidance of your Chair, the search committee should generate a list of qualifying questions, such as Do you have any "hands-off" agreements that preclude you from approaching certain organizations? How might you expand the search universe beyond the obvious? Can we talk with a current client? The search committee may well need to refine the questions after a few evaluations to determine whether they are effectively eliciting worthwhile responses.

When evaluating a large firm, ensure you are asking the questions of the individual(s) who would be actively conducting your search. For example, an individual in the partner role at a large executive search firm might initiate a search, but will not be actively involved in the process and critical daily details. It's imperative to believe in and feel you can develop a relationship with the person(s) actually working on your behalf. After all, there is a lot of money and time at stake.

When evaluating a boutique firm, you will likely speak directly with the individual who would handle your search, so there's immediate transparency. One question to ask is about capacity. How many searches are they actively carrying? Additionally, since boutique firms tend to be more specialized than large search firms, it's critical to ask probing questions

regarding past experience. What are some examples of recent successes and how do these demonstrate resourcefulness in finding the ideal candidate? How do these examples align with the needs of our organization? After all, this is worth repeating, there is a lot of money and time at stake.

That said, the most important ingredient for effective search today is creativity. In light of increased accessibility—including social networks and other online search tools—it's relatively easy to find names of potentially suitable candidates. So it's critical to assess the firm's passion for the "art of search." How creative is the search professional assigned to your project? Can he/she choose a candidate that matches and illuminates your canvas of an idea? What's your gut feeling? Creativity generally manifests as a wellspring of exceptionally unique and exceedingly relevant approaches. This is an invaluable quality and you need to find it in your search firm. If you do, you will not be disappointed.

Be Transparent with the Organization's Employees about the Executive Director Search

Inform your employees of the decision to search for a new Executive Director immediately. Hold a meeting, explain how the process will work, and describe what kind of person you hope to find. Not only can employees be helpful in suggesting possible candidates, the transparency gives them the profound feeling of being involved and trusted. If you are not inclusive with regard to the process, employees can feel uncertain about the direction the organization is taking and look for another place to use their great talents and skills. This is absolutely not what you want!

Refer Competitive Internal Candidates to the Search Firm for Evaluation, but Search Committee Handles Expectations

A true internal Executive Director candidate can be ideal, but you should still have the search professional conduct an objective evaluation. First, determine which search committee member will act as the emotional liaison to the candidate—the recruiting process can be very stressful and the search professional's job is to evaluate the employee, not necessarily support him/her. The best search committee liaison is an individual without a strong relationship to the candidate. The member should set the candidate's expectations and confirm the process. After that, give the search professional a complete briefing that details why the Board considers the individual a competitive candidate. As the process moves along, the liaison needs to update the candidate honestly and openly.

Treat Unqualified Internal Candidates with Candor

If an internal candidate who is not qualified for the ED role expresses interest in the position, determine which search committee member will handle delivering the truth in the most frank and judicious manner. There will likely be more than one conversation as showing interest in changing roles at an organization can be a very emotional situation and demands attention. The search committee member should be qualified to manage the employee's career expectations in thorough way, and if the individual is valued, he/she should be shown the path toward assuming a different role in the future. Be aware that the search process and the search professional will not solve the issue.

Be Clear about Executive Director's Fundraising Requirements

The Chair of the Board must be extremely open about the organization's past ability to raise funds and set clear expectations for the future. A significant and very public part of the Executive Director role is to raise funds and each member of the Board should be very involved with the process. It seems intuitive that a candidate with a great fundraising track record would be the best choice, but that's not always the case. Often, the best Executive Directors are those who have had a taste of annual fund raising, aren't afraid of it, have good

contacts in the philanthropic community, are good leaders in the non-profit world, and have perhaps sat on a Board before. Great fundraising Executive Directors generally don't follow up a challenging fund development position with another challenging position. There is often a shelf life for how long someone can aggressively fund raise.

Most Boards recognize the importance of being actively involved in the Executive Director search process. However, it never hurts to get a little bit of advice from someone who has been in the business for more than 25 years. I guarantee your Executive Director search will go more smoothly if you follow these six steps.