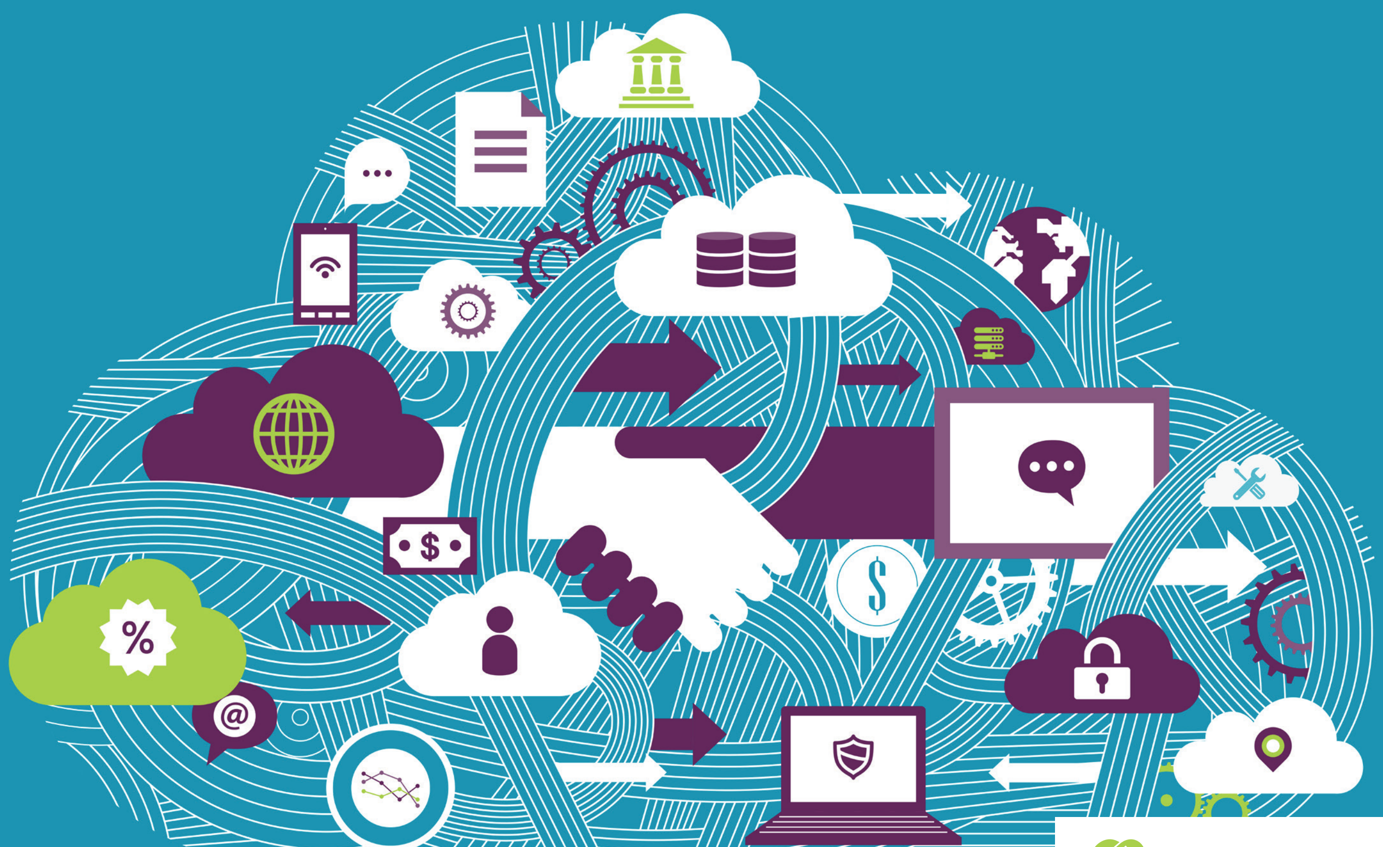
WittKieffer

Recruiting Exceptional Nonprofit Leaders

Best Practices from WittKieffer



NOT-FOR-PROFIT

Table of Contents

Introduction: Seeking the Exceptional

What makes a not-for-profit organization great? Its mission, of course, as well as dedicated staff, volunteers, board members and various stakeholders. What may be most important, however, is exceptional leadership. It is leadership that can be the difference between an organization thriving or merely surviving.

What defines an exceptional nonprofit CEO or executive director? Several key attributes come to mind: creative, credible and communicative. He/she must have the ability to inspire the ranks, raise funds and ensure long-term sustainability. An exceptional nonprofit leader understands public policy, public relations, corporate partnerships, operational excellence and, most of all, strategic planning.

Because recruiting such exceptional individuals is an imperative for today's not-for-profits, we have published this guidebook, *Recruiting Exceptional Nonprofit Leaders.*

The pages that follow share essential insights that a nonprofit organization must know as it recruits its next CEO or other top executive. These contributions are authored by members of WittKieffer's consulting team who live and breathe these topics in their daily work.

Enjoy this resource as you, too, look for the exceptional in your next leader.

Julie A. Rosen
Leader, Not-for-Profit Practice

Effective Nonprofit CEO Search Committees

By Mark J. Andrew

Takeaways

By following these basic guidelines and completing this "to-do" list, a search committee will have laid the foundation for an effective process that will enable an organization to recruit top talent for its next CEO.

- Committee quarterback
- Strong membership
- Time commitment
- Optimal committee size
- A clear charge
- Effective interviews
- Confidentiality
- Ability to close the deal

When a CEO or top leadership transition happens, what goes on the proverbial "to-do" list? Organizations faced with either a planned or unplanned transition of their CEO are often unsure how to get started identifying a successor. An expected or unexpected leadership transition warrants a thoughtful process which begins with the appointment of a search committee.

A highly effective search committee can be a great asset in enabling an organization to attract top talent (even to a less-than-ideal organization/position). Conversely, a poorly planned and constructed search committee can frighten away even the most motivated candidates.

Committee quarterback. The board should give careful consideration to the person appointed as the search committee chairperson. This person will organize the process with the search consultant and communicate with the committee as well as the broader organization. As such, the search committee chair should have the time to fully commit to the responsibility. It is important to select a chairperson with the political savviness and interpersonal skills to lead the group. Candidates will judge your organization, in part, on their interaction with the search committee chair.

Committee membership. You are competing for talent. In order to win, you want to put the best team on the field. Not only does this group of people have the responsibility of selecting and conducting the initial interview of the candidates, but they represent the organization. An impressive and sophisticated search committee leaves a lasting first impression on candidates, as does an unimpressive search committee. Committee members should have expertise, thorough knowledge of the organization and the ability to evaluate candidates objectively.

They should also be able to demonstrate sharp business acumen representative of a high-performing board. Consider a core group of board leaders composed of the immediate past board chairperson, current chairperson and chairperson-elect. You may want to include other stakeholders such as foundation board members. Some boards consider having senior-level executives on the committee who have very detailed knowledge of the inner workings of the organizational culture. However, some boards decide against having members on the committee that will have a direct reporting accountability to the CEO.

Time commitment. Putting the best team on the field to win means identifying teammates that can commit the necessary time to the process. No matter how bright and impressive committee members may be, if they cannot devote the necessary time to attend every meeting, they can become a liability to the process. When selecting the ideal committee members, make sure they fully understand the time commitment.

Optimal committee size. In considering the number of people to appoint to the search committee, it is important to have a manageable number that represents the stakeholders but does not become unwieldy. Most committees consist of seven to nine people. A larger group tends to become slow and unmanageable, but a smaller group may not represent a cross-section of stakeholder views.

Charge of the committee. It is vital that the search committee and board clearly understand the charge of the committee so there is no confusion as to the deliverables. Some committees are given the charge of narrowing the candidate pool to two or three final candidates to advance to the full board. Then the full board will interview and select the candidate of choice. At other times, committees are charged with selecting and advancing one name to the full board for ratification. The process will need to adapt based on the charge of the search committee.

Candidate interviews. Develop questions for the committee prior to the interviews that are linked to the position specification or leadership profile. These questions simply serve as a guide to ensure consistency in the topics covered to allow for effective comparison. At a high level, these questions should elicit answers that develop a picture of a candidate's leadership, knowledge and experience, and personal and professional objectives. It is important not to become overly structured or mechanical in the interview, but rather to achieve an effective dialogue. Each candidate will be interviewing the search committee, just as much as the search committee will be interviewing the candidate.

Confidentiality. It is essential to maintain candidate confidentiality at all times through the process. A breach of confidentiality can jeopardize a candidate's current employment or damage the relationship with their board, supervisor and/or staff and may cause the candidate to withdraw from the search. It can be terribly disconcerting to lose that top "draft choice" due to a breach in confidentiality or a leak from the board room. Even when dealing with internal candidates, any feedback shared with the committee by other stakeholders must be held in strict confidence so as not to damage peer relationships or future supervisory relationships.

Closing the deal. Identify a point person or a two-person team to negotiate details of the formal offer with the candidate of choice. The formal offer should be based on parameters established and approved by the board in advance, often using information and data provided to the board by a compensation firm. If the give and take in negotiations has to be discussed with the entire committee, negotiations can get bogged down and the candidate may very well lose interest and choose to pursue a competing offer that moves more quickly.

By following these basic guidelines and completing this "to-do" list, a search committee will have laid the foundation for an effective process that will enable your organization to recruit top talent for its next CEO.

The Best Search Committees

By Zachary A. Smith, Ph.D.

As a former college administrator and now a recruiter, I've had the opportunity to observe hundreds of search committees. Some are highly productive, with members who are focused, efficient and collaborative. Others are less so – spending hours, for example, debating missing commas or unfounded assumptions about candidates. Search committees, by nature, are imperfect and varied.

Every so often I have the pleasure of working with a committee that seems to get how to carry out its charge expeditiously and effectively. I'll think, "This is the best search committee I've ever seen." What makes it so? Allow me to offer a few defining characteristics. Invariably (and in no particular order) this type of committee:

Appoints a strong chair. So much of a search committee's success flows from this one person. What makes a strong chair? A thick-skinned individual who can stand up to a sabotaging committee member. Someone who leads by example and provides opportunities for everyone on the committee to speak and be heard, but has the strength to push back against those who filibuster or try to control committee outcomes. Good chairs express their own opinions but also put personal biases aside for the greater good.

A strong chair keeps the committee on task and moving forward. Committees need an appropriate (and, these days, increasingly aggressive) timeline, and it is the chair's responsibility to avoid unnecessary delays. When a committee is deadlocked, the chair must make difficult decisions, all while balancing the best interests of the institution.

Solicits broad input. Good committees appreciate all voices. Not all of those voices have comparable credentials, but their varied perspectives support collective, thoughtful decisions. The corollary here is that all committee members must be dedicated to asserting their opinions.

Focuses on the known. Search committees can fall victim to making hasty presumptions about candidates:

Takeaways

Defining characteristics of the best search committee:

- Appoints a strong chair
- Solicits broad input
- Focuses on the known
- Listens to the search consultant
- Advances candidates on potential rather than experience
- Balances evaluating with selling
- Makes diversity a priority

Why would Candidate A want to relocate to our area?

Candidate B is clearly using us as a stepping stone.

And my personal favorite:

I hear that Candidate C is in another search; we must be his backup plan.

Good committees don't get caught up in speculation. They understand the risk in presuming a candidate's motivations before speaking to that person. A good search consultant, by the way, contributes by keeping the focus on the known and filling in details that may be lacking.

Listens to the search consultant. Of course I'm biased, but let's apply some logic to that statement. An organization hires my company to provide advice and experience. We are experts at managing executive leadership searches, in the same way that committee members are specialists in their academic fields. We have talked to thousands of candidates and worked on hundreds of searches. We know the hard questions to ask, the red flags, and the strengths and weaknesses of the candidate pool. We apply a level of due diligence during the search that removes significant risk from the process.

Some committees are tempted to ask the consultant to leave the room during candidate interviews or critical discussions. I was once asked to stand in the hall during committee deliberations. Fortunately for me, the committee chair pushed back and encouraged me to stay.

My point is that search committees should listen carefully to their consultant. Whether or not our advice is followed is ultimately up to them.

Advances candidates on potential rather than experience. That might sound counterintuitive, but those of us in the search business know that a candidate with high potential is often the best candidate. Good committees focus on competence and fit over work history, so long as candidates meet appropriate levels of experience and job requirements. Soft skills and qualities — like work ethic, social and political acumen, diplomacy, leadership presence, and effectiveness — are often better predictors of success in a position than experience alone.

Balances evaluating with selling. Vetting candidates is a primary charge of the search committee. But the strongest and most effective committees know how to do this with sincerity and warmth. They understand that the candidate is interviewing them as much as they are interviewing the candidate. They balance evaluating the applicant with selling that person on the opportunity.

I have seen strong candidates withdraw after being treated poorly by search committees. Something that committee members should keep in mind: The best candidates are going to be the least tolerant of bad committee behavior. Desperate or over-eager candidates are more likely to overlook an inappropriate comment or the committee member who is paying more attention to a smartphone than to the candidate. Likeability, effort, and attentiveness matter on both sides of the hiring table.

Makes diversity a priority. The best search committees not only advocate for inclusion and diversity but ensure that semifinalist and finalist pools present candidates from different molds. I believe committees (in addition to consultants) have an obligation to be proactive in recruiting a diverse pool.

So the next time you are asked to serve on a search committee, take some time to reflect upon these and other characteristics that can make it great. Applying what you learn increases the likelihood of hiring the right person.

[A longer version of this article was originally published by the Chronicle of Higher Education. Permission to reprint has been granted.]

How Search Committees Can See Bias in Themselves

By Lucy A. Leske

Questions about implicit bias are now part of many healthy, serious conversations. These are critically important discussions to have, if only to cause every one of us to pause in our daily lives and consider the preconceptions and prejudices we may have.

One forum in which there is a need for continued exploration of bias is the leadership-search committee. In an effort to reduce bias and to ensure a diverse pool of candidates for leadership roles, institutions typically populate search committees with a mix of representatives — the idea being that diverse points of view and backgrounds will, among other things, bring implicit bias into the open and prevent it from coloring decisions.

The committees are inherently representative, but their members still bring with them hidden motives. With diversity of representation comes diversity of biases — about gender, race, age, body type, sexual orientation, dialect, accent, alma mater, hometown, degree worthiness, hairstyle, clothing. The list goes on.

What don't we have biases about?

The challenge is identifying and recognizing when bias is affecting decisions, as well as figuring out whether to do anything to mitigate bias that works against the institution's mission, values and strategic priorities.

Broad representation can work in a committee's favor as members question one another's rigidities about types of candidates. However, having a diverse committee does not necessarily ensure that all voices are welcome or heard, nor does it ensure that bias will be eliminated. Group dynamics like seniority and interpersonal relationships can dampen honest and transparent conversations.

Entire groups can also bring blinders to the table. Conscious or unconscious, bias is always present and a challenge to ferret out.

Takeaways

Search committees should consider these questions before embarking on executive and leadership recruitments to ensure that bias is brought to the surface or reduced:

1. What are our goals in regards to implicit bias?
2. Which biases should we be on the lookout for?
3. Which of those biases may be specific to leadership recruitment?
4. What methods and technologies are at our disposal?
5. What's our plan?

In more than 20 years of work supporting administrative-search committees, I have observed both overt and hidden bias surface in many forms. Let me be the first to say that I recognize that my own judgment and analysis are influenced by biases developed long ago through my own upbringing and experiences. It takes hard work and constant examination of criteria, openness to others' points of view, and a commitment to supporting each committee in its values to stay unbiased and offer good advice.

That I have seen bias creep into senior-level search committees should be no surprise, but it is always remarkable to hear it, nonetheless.

A common bias, for instance, relates to a candidate's educational pedigree. So many search committees begin evaluating candidates there — making immediate and implicit assumptions about background, intelligence and intellectual capacity. Their bias clouds their ability to evaluate what candidates have been able to accomplish with the tools and experiences they have had.

Biases are also not evenly applied across all sectors and positions. A committee member may be entirely comfortable with the notion of hiring someone from an underrepresented group for an entry-level or professorial post, but have subconscious hesitations when the opening is for a senior administrator: Do I want this person representing my entire institution? What will people think?

Women may get eager interest for mid-level staff positions in IT or finance but not be taken seriously as potential CIOs or CFOs. Interestingly, I frequently hear from women that they were advised early in their careers not to go after management positions but, instead, to take more interesting non-supervisory positions, a choice that reverberates later. I have seen committees eliminate fine candidates from consideration because of speculation that a résumé full of staff roles must mean the person is not a good manager.

As search consultants, despite some of our best efforts, it is an uphill battle getting committees to put their actions behind their words and show that they are truly open to diverse backgrounds. Bias clogs the machinery all the time.

That said, there are ways we can minimize implicit bias. Sometimes it is as simple as asking committee members to take an Implicit Association Test from Project Implicit. As one of the project's founders, Brian A. Nosek, a professor of psychology at the University of Virginia, has said, "Gaining insight into the mental operations that lead behavior astray of values is a precondition for predicting, understanding and controlling implicit biases."

Another approach gaining some ground is the use of assessment tools, particularly in high-level leadership searches. A search committee uses the tools to evaluate a candidate's competencies, values and motivators without any details of the person's race, background, gender or other such factors. The results are then compared with a larger database of executives who are high performers in the same sector.

Matching an applicant's competencies against what the institution is trying to achieve doesn't eliminate bias from decision-making, but it adds an unbiased method for evaluating a candidate's fit and leadership potential. These assessments are a little like the opaque screens used in orchestra auditions — they strip away all physical attributes, educational background and employment history, and bring to the surface the very things that organizations need to succeed.

For search committees that want to ensure that bias is either brought to the surface or reduced, here are five questions they should consider before embarking on leadership recruitments:

What are our goals in regards to implicit bias? Can we recognize our own biases to a greater degree, and thus minimize or eliminate them to reduce their effect upon viable candidates? Can we incorporate them into our discussions around candidates as they move forward through the process?

Which biases should we be on the lookout for? In addition to race, gender and other common categorizations, are there additional (perhaps more subtle) biases that could affect the search?

Which of those biases may be specific to leadership recruitment? Search committees should be aware that biases may crop up in senior administrative searches in different ways or intensity than in staff searches. The committee must guard against stereotyping around socioeconomic class, academic degrees, nationality and professional experience.

What methods and technologies are at our disposal? How do we test ourselves? (Do we use the Implicit Association Test? Or undergo bias training through a consultant?) Other questions to consider: Is our institution experimenting with software and other technologies designed to eliminate references to gender, race, and other identifiers — even academic credentials? What about competency assessments? Are they effective in reducing biases, especially for senior-administrative positions?

What's our plan? How do we take our newfound knowledge about implicit biases and use it to actually minimize those biases as we begin a search?

Implicit bias may rear its head at any stage of the hiring process, and it is essential that search committees acknowledge that and ask the right questions from Day 1.

[A longer version of this article was originally published by the Chronicle of Higher Education. Permission to reprint has been granted.]

What to Look for in a Nonprofit Leader Today

By John Fazekas

Passion for the mission has always been a critical quality that boards or search committees seek in a new leader, but today's nonprofits cannot afford to run solely on passion alone. As organizations seek new executive directors or CEOs, they look to identify a leader who can build a brand, differentiate the organization in a crowded space and guide it to financial stability and sustainability. Clarity on strategic priorities and proof of impact have risen to the top of organizations' priority lists, with substantiated results expected of top nonprofit executives.

In working with nonprofits to recruit executive directors and CEOs, my colleagues and I see organizations prioritizing the following as essential skills and competencies:

Partnering/Building Alliances: Standing apart from the crowd is every organization's intent, but doing what is best for the population being served should be the goal. In recruiting leaders for nonprofits, clients are increasingly looking for entrepreneurs as well as for individuals who seek to partner with other nonprofits or even corporations to further the mission and programs. Wrestling with the best way to scale, expand or do more for a population often means recognizing that there may be other not-for-profit organizations, and even in some cases companies, who are willing and able to partner to offer complementary services.

Strategic Program Leadership/Performance Metrics: To be seen as a thought leader and an innovator, a nonprofit director or CEO needs both political and strategic skills. Spending dollars wisely, taking a pragmatic look at programs and using hard data to demonstrate that programs and services are impactful are all qualities boards and search committees are emphasizing as they recruit new executives. Today's leaders are expected to introduce innovations that broaden their organization's reach or raise the level of service. They must be able to design and implement comprehensive performance metrics and cannot be afraid to cut programs that drain resources or have run their course. Maximizing each dollar is a must, and public and private donors come to expect this from not-for-profits.

Takeaways

Organizations prioritize the following as essential skills and competencies for executive directors and CEOs:

- Partnering/Building Alliances
- Strategic Program Leadership/Performance Metrics
- Fundraising, Fundraising and More Fundraising
- Social Media/Brand Building
- Subject Matter Knowledge
- Ability to Demonstrate Credibility, Quickly

Fundraising, Fundraising and More Fundraising: Raising money is no longer an activity that can be delegated to a development director, but one in which the CEO or executive director must play an active lead. Many nonprofits are feeling anxious as federal or state funding is cut, competition for donations is at an all-time high and legacy donations shrink. Boards see the uncertain financial forecasts and many organizations are demanding their new leader be exceptional at finding sources of revenue and setting fundraising strategy.

While a nonprofit may want the next ice bucket challenge to grab attention and raise large sums of money quickly, in reality it is the collection of strategic activities and carefully planned and executed fundraising strategies that build financial support. Development officers are consistently replenishing the pipeline, so CEO and executive director candidates must demonstrate that they can continually seek new sources of revenue, whether donations, grants, corporate alliances or programmatic partnerships. I have recently encountered several successful CEO candidates, in fact, who were able to point to for-profit entities they had launched that in turn supported their parent organization.

Social Media/Brand Building: Organizations want leaders who know how to build brands and establish bonds for the future. Engaging a new generation of supporters requires communicating with and providing information in new and creative ways. There is no single media or social media tool that is a must-have, but today's nonprofit leaders must know how to appeal to a target audience in a manner in which they will respond and share the organization's story with others.

Subject Matter Knowledge: Knowing the industry has always been on any organization's wish list for ED/CEO candidates, but with today's increased competition for funds, grants and donors, the bar is even higher. Organizations and search committees are looking for candidates who truly know the landscape and the key players (returning somewhat to earlier times in the nonprofit industry). Organizations want to know of candidates: "What does she/he know about our space?" or "How transferable are their skills and how long is the learning curve?" This refers in particular to candidates who come from the for-profit sector, and may have impressive resumes but still must show familiarity with the organization and its environment.

Ability to Demonstrate Credibility, Quickly: Nonprofits look for new executives who will take time to learn the history and culture of an organization. Nevertheless, a new leader must quickly identify what can and should be done, and display calculated decisiveness. Waiting too long to act can be frustrating and create doubt in the eyes of the staff and board. "Slash and burn" is by no means the right course, but early changes in a new leader's tenure will confirm that the right hire was made.

On a final note, as nonprofits look to scale, replicate in new regions or seek a national platform, search committees often shift the title of the leader they seek from executive director to CEO. Whatever the title, however, today's nonprofit leaders must show a varied and comprehensive skill set that supports the organization's mission and ensures sustainability.

[This article originally appeared on the NonProfitPRO website. Permission to reprint has been granted.]

How to Spot Cultural Fit in Nonprofit Leadership Candidates

By Andrew R. Trechsel

Company culture is defined by strongly held and widely shared beliefs that organizations support through their strategy and structure. As any executive search consultant will tell you, cultural fit is a critical factor in hiring.

While this is true for every organization, despite its tax code, it is incredibly important for not-for-profit organizations. This is because the executive must be able to passionately speak about the mission internally, to keep everyone working toward the common goal, but also to represent the organization externally, creating strong, committed relationships within the community.

> "The executive must be able to represent the organization externally, creating strong, committed relationships within the community."

While every not-for-profit is driven by a mission, unique cultures exist. For example, despite being a not-for-profit, an organization may possess a more business-driven environment, requiring executives with strong financial acumen. Others may feel more like start-ups, requiring the executive to be agile, innovative and collaborative.

Therefore, a first step to assessing cultural fit in leadership candidates is to define what an organization's culture is. If this is not defined or known, the following questions can be asked:

- *What truly defines your organization?*
- *What are your core values and/or mission statement? Do you follow them? Maybe some more than others?*
- *What is your level of hierarchy?*
- *What is the level of urgency within the organization?*
- *What is the atmosphere within the office?*
- *What do you (or don't you) invest in that defines and drives culture?*

When considering these questions it is important to seek feedback from all levels of the organization, as the management team may believe one thing while employees experience another. When hiring an executive over a particular department or region, the organization should take extra consideration of those within that group, as subcultures can often that exist.

Once culture is defined and before recruiting for a new role, the organization must create a leadership profile or position specification that reflects which criteria will be used to gauge candidates and their "fit." As the recruitment begins, there are other considerations:

The Resume: What signs on a candidate's resume may suggest cultural fit? For starters, look for individuals who have worked for similar sized organizations, other not-for-profits, or in your industry in the past. This will indicate a willingness and readiness to work in an organization like your own. Someone with longevity in the not-for-profit space or who has successfully made the transition from the for-profit sector is also someone to keep an eye on.

While you will undoubtedly come across candidates with a deep tie to the mission, or volunteer experience in similar organizations, do not forgot about the job at hand and be sure to confirm they have the right functional experience. Just because someone has worked weekends for a similar organization does not mean they are ready to be your next CEO.

The Interview: This is probably the most important part when assessing cultural fit, as the candidate is now moving "off the page" and it gives you an opportunity to ask more personalized questions. When interviewing candidates, search committees can gauge cultural fit through a series of questions, such as:

- *What do you do in your free time, including volunteer and board work?* If their interests align with your mission, that is a good sign.
- *What about our organization makes you want to fully devote yourself to it?*
- *What aspects of our core values and/or mission statement do you align with?*
- *What types of organizations do you like to work in? What is the best place and/or worst place you have ever worked?* In this scenario, listen for cues that indicate whether they would fit in your organization
- In the case where a candidate is coming from a larger, or even for-profit organization, with significant resources ask, *when is a time you have had to do more with less? Or, why are you considering a not-for-profit at this time?*

It is also important to explain your environment and ask if the executive is comfortable working in that kind of atmosphere. Again, get multiple stakeholders involved in this process, especially supervisors, peers and direct reports who will interact with this executive often.

One important thing to note is that, every so often, people target not-for-profit work as a way to "slowdown." Don't be afraid to explain the time commitment and effort necessary for the job at hand and ask if they are comfortable with that. If the executive has a more relaxed schedule in mind, it may be better to talk to them about volunteer opportunities.

The Follow-up: During the interviewing process, does the candidate check-in regularly to reiterate their passion about the opportunity? Is there a near obsession with learning about the organization, imagining a vision for the future, and reiterating interest in the role? If so, this is a good sign.

After the Hire: Congratulations! You have identified the candidate with the right skillset and cultural fit and they are ready to join your organization. However your work is not yet done. Ensure that HR has the right orientation and onboarding that supports the organization's values and outlines how the executive will be expected to work within the established culture. In addition, ensure you have a performance management program that rewards and recognizes the employees that exhibit a commitment to the company's values, as this will help continue to strengthen your culture.

Following these guidelines, you should be able to identify the successful candidate by the end of the executive search process – one who has an enthusiasm for your mission, is comfortable working in your environment, and possesses the skillset necessary to tackle the job at hand.

[This article originally appeared on the GuideStar Blog. Permission to reprint has been granted.]

How to Spot Fundraising Potential in Leadership Candidates

By Suzanne Teer

Search committees and organizations recruiting nonprofit leaders are often met with a major sticking point: the most appealing candidates often don't have much fundraising experience. Yet in today's climate, all not-for-profit leaders must be capable of building donor relationships, "making the ask" and securing gifts.

How can a search committee or other hiring authority recognize a candidate who might lack fundraising experience yet turn out to be a stellar fundraiser? Look for qualities in leadership candidates that do not necessarily appear on the CV or resume.

As they recruit, organizations can look for potential and aptitude related to the following key attributes of a successful fundraiser:

Vision: Successful fundraisers have vision. If they've done their homework, candidates should be able to describe ideas about what's possible for your organization's future and do so in a way that excites you and compels you to want to learn more. Ask individuals who interview for top positions about their vision. In responding do they draw you in? Do they leave you wanting more? How would you rate them in making a compelling case?

Connection: Fundraising is about building relationships over time. To do that, your future leader must be able to connect with people. This means being fully present, listening well, asking thoughtful questions to understand what is important to others. This is not about being an extrovert; it's about being a fully engaged human being. How you experience the candidate in an interview will not be unlike how donors will experience them. Take note of how well they connect, listen and engage with you.

Teamwork: Fundraising is a team endeavor. Organizational leadership and staff must work together over time to secure a new gift. Thus, your candidate must

Takeaways

Organizations can look for potential and aptitude related to the following key attributes of a successful fundraiser:

- Vision
- Connection with people
- Teamwork
- Willingness to engage in fundraising

be a good team player. Ask them to share a story of how they partnered with others to achieve a common goal. How do they talk about their role and that of others on the team? Are they respectful? Did they acknowledge that others provided valuable expertise they didn't have? Did they acknowledge learning anything from the process? If you were on the team the candidate is describing, how would you feel about the way they portrayed the effort?

Willingness: A desire to engage in fundraising is essential. A candidate might feel reluctant or anxious about their ability in this area. That's normal. But they must be genuinely willing and open to do the work. Pay attention and check in with your instincts: is this candidate being sincere about the time and effort they are willing to commit or are they just telling you what you want to hear?

A new leader can build upon these attributes to ready themselves for their fundraising role and learn the specific skills and tactics. Demonstrating these qualities when they are in front of a search committee is a first step. Pay close attention and take note of your experience of this person – it's likely you will be on the mark with your assessment.

Many leaders share their reluctance about fundraising and their eventual surprise at how much they enjoy it. Often they remark, "It's exciting to learn about what is important to our donors and inspiring to see how their interests match with what we are doing at our organization." If they have vision, can connect with others, are a good team player and are willing to learn and do the work, they will likely be successful at it, too. Once they join your organization, then it's time to support them and make sure they can be successful in their new fundraising role.

[A version of this article previously appeared in University Business. Permission to reprint has been granted.]

What Not-For-Profit CEO Candidates Must Ask

By Julie A. Rosen

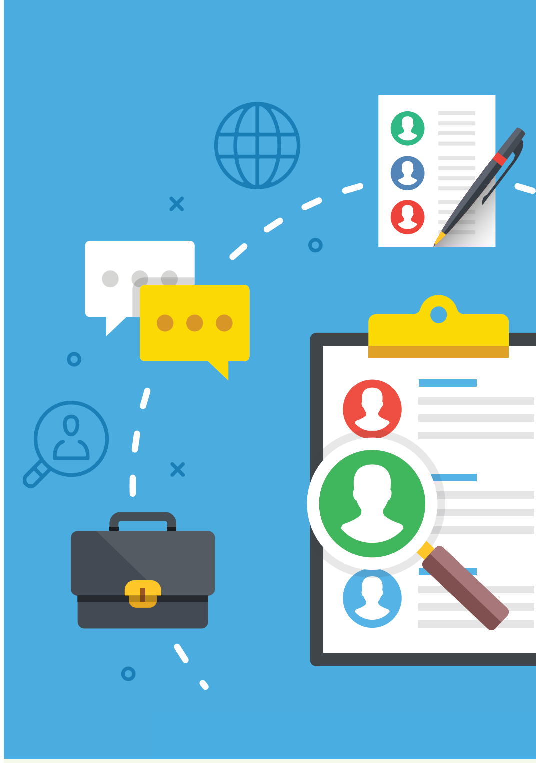
When recruiting chief executives for not-for-profit organizations, I pose one key question for each candidate: Are you truly passionate and committed to the organization's mission and its work? This is fundamental. As a not-for-profit CEO, you will be eating and breathing this work, 24/7. There are a lot of great organizations out there and you should believe in your heart of hearts that this is the most important one for you, so that others believe it as well.

As a candidate, if the answer for you is yes – you are deeply passionate about the mission – the next step is to evaluate the organization. Is it ready for you and the right place for you?

On that note, here are essential questions that a prospective candidate should ask in considering a top nonprofit role:

1. *What is the financial health of the organization?* The famous phrase goes, "No margin, no mission." The organization has to have a financial foundation for you to succeed as its leader. While reviewing year-to-date and most recent audited financials should be possible as a search progresses, the best initial source of information is the annual 990 statement prepared for the IRS. Look at the income statement that reflects the annual results of the core business, as well as the balance sheet providing a picture of the overall health of the organization—for example, are there assets and reserves? Is there enough money to pay staff and overhead month to month? Next, look at the statement of activities. Is the revenue diversified or only from one source? Is the revenue consistent or does it increase year after year? On the expense side, have the expenses fluctuated or are they consistent? Do the expenses match the revenue and is there a surplus? These are tough questions, but critically important for you to know.

2. *Has the staff been stable and productive?* Not-for-profits, by their very nature, do not always have the resources to hire staff at market rates. All employees, like you, need to be passionate about the mission and work.



Takeaways

Essential questions that a prospective candidate should ask in considering a top nonprofit role:

1. What is the financial health of the organization?
2. Has the staff been stable and productive?
3. Is there a strong and stable board?
4. Are there bylaws and provisions for board member term limits?
5. Does the organization have a loyal donor base?
6. What is the profile and reputation of the organization in the community?
7. Why did the last ED/CEO leave?
8. What are the measures of success in the first 18 months?

Given the lack of resources, turnover can be higher than in for-profit companies. Nevertheless, are there a core group of people who have been there for a few years and can help with the transition? On the other hand, there may be a staff member (or two) who is not adapting to change or aligned with the mission, and you need to know going in whether you will have the latitude to move them along. If not, what are the consequences to you if that person stays in the organization?

3. *Is there a strong and stable board?* The board underpins the organization's success. Get to know a few of the members. If possible, meet the past, present and future chairs and ask yourself, do I like and trust them? Ask members, why are they committed to the organization? Is there alignment and agreement between the members? Finally, how does the board interact with the CEO? That is, the board has a fiduciary responsibility and should provide strategic advice and counsel and not be involved in the day to day operations.

   In considering the board, evaluate its core committees:

   Executive Committee: Comprised of the chairs of the core committees and past and current board chairs, does it make strategic decisions in between board meetings and support the work of the CEO?

   Finance Committee: Is there a finance committee and staff dedicated to overseeing the financial picture of the organization? This committee should monitor the overall financial status of the organization and meet quarterly and provide advice and guidance.

   Nominating Committee: What is its track record in selecting leadership for the organization? Are the nominating committee chair and members strong and free of bias? If the nominating committee is a rubber stamp for past leaders, this is a warning sign.

   Governance Committee: The government committee should show success in reviewing how effectively the board is working and monitoring whether there should be changes to the bylaws.

   Development Committee: Does an active development committee exist? Is there a commitment of the board members to both give and raise money? Many boards were formed without clear expectations of what they should give, and what they should raise. There is an old adage – "give, get or get off," and that is reasonable for not-for-profit board members.

4. *Are there bylaws and provisions for board member term limits?* Familiarize yourself with the bylaws and make sure that they are up to date, and if not, understand why. Has there been reasonable turnover on the board? While continuity is helpful for many reasons, it is imperative that the board continue to regenerate itself with new people in order to bring in new ideas, and fresh support and contacts.

5. *Does the organization have a loyal donor base?* And can you talk to any of these individuals? I would suggest talking to a small range of donors to understand their commitment to the organization. This would include major individual, foundation and corporate donors, as well as any customers who support the not-for-profit. It is essential to understand why and how long they have supported the organization and to understand their motives. Engaging with the donor base during the interview process will not only allow you to understand their issues, but will help you build a future relationship with those people should you become CEO.

6. *What is the profile and reputation of the organization in the community?* You can answer this question by interviewing community leaders and key opinion leaders who should know about the organization. You can also do a media search to look at press coverage over the last year, and comments on social media. Is there a positive vibe around the organization?

7. *Why did the last ED/CEO leave?* You should talk with the board, staff and, if appropriate, the outgoing CEO or executive director to understand why this person left and if there are issues that are outstanding. Will the same things that caused this individual to leave cause you to move on as well?

8. *What are the measures of success in the first 18 months?* Make sure that there is at least general consensus on what needs to be done in the first 18 months. Not-for-profits are tricky and there are a number of constituencies who are entitled to determine the course of an organization. Getting consensus on those priorities before accepting the job is absolutely essential in order to be successful.

These are tough questions to ask and take time to consider. Nevertheless, they are an essential part of your due diligence regarding the top job with a not-for-profit. If you get positive information about most or all of these questions – and you truly care about the mission – then this is the right place for you.

[This article originally appeared on the GuideStar Blog. Permission to reprint has been granted.]

Gender in the Job Interview

By Robin Mamlet

As women move up the leadership ranks, they find fewer and fewer female peers. That's been fairly well documented and is no surprise to those of us in the executive search industry.

Why that's the case is a topic fraught with complexity. There is the matter of stepping up and *Leaning In* to be sure, but there is also sexism – sometimes the overt kind and sometimes the subtle kind that occurs all along the leadership trajectory and affects who is mentored, who is labeled "leadership material," and who gets the kind of opportunities and assignments that lead most directly to advancement.

Of the many factors that limit women's advancement, two are things we ought to be able to resolve: how candidates present themselves in job interviews and how search committees interpret those interviews.

In any given month, I sit in on a few dozen interviews. One can't help but notice some distinct patterns in how interviewees behave. In my experience, women and men seeking executive roles frequently present themselves differently, and the differences typically do not work to the advantage of the female candidates.

Let me make clear from the outset: I am *not* suggesting that women should act more like men in interviews. There is a range of styles used successfully by candidates of all genders in front of search committees. I have found that if candidates have a strong substantive record – e.g., if it is built on extensive experience, articulated clearly, and cites convincing examples – they can convey that through a variety of leadership styles. Presentation won't make up for a lack of substance – not for long, anyway.

Likewise, I well understand the danger of making generalizations about gendered behavior. However, I believe the administrative careers of some women are suffering due to a misalignment between their self-presentation and their interviewers' expectations. That dynamic could be vastly improved with greater awareness on both sides of the hiring table – and with better direction from the managers overseeing the search.

Takeaways

Gender-related behavioral patterns often seen in executive interviews:

- Body language
- Qualifiers

Advice for candidates to present stronger in an interview:

- Think ahead of time about how you want to come across to the committee.
- Consider your reputation.
- Start strong.
- Take credit.
- Show confidence and presence.

That women and men use different communication strategies is controversial though nothing new. In her 1990 book *You Just Don't Understand*, Deborah Tannen, a linguistics professor at Georgetown University, spawned widespread discussion and scholarly debate regarding the differences in personal communication styles between men and women. (Women engage in "rapport-talk," she argued, and men in "report-talk.") Further, there is growing research regarding how implicit and explicit gender bias can play a role in the success or failure of women in job interviews, the workplace and other career settings.

Allow me to share some of the gender-related behavioral patterns I often see in executive interviews within higher education.

Body language. Most men, when they come into an interview room, seem quite comfortable claiming space. They employ a straight, high-shouldered posture that suggests they are in command, and they don't mind spreading out at the table or using open, sweeping gestures and body language that suggest authority.

Some women excel at that, too. I can spot them immediately. They are comfortable occupying space and they "own" their spot at the interview table. Frequently, these are the few women who are already college or university presidents.

Harvard professor Amy Cuddy studies body language and "power posing" – the "classic" feet on the desk with hands behind the head, or "standing and leaning on one's hands over a desk" versus sitting (or standing) with arms held close, hands folded, and legs crossed tightly. Cuddy's work is controversial, to be sure, but many candidates would benefit from reviewing it. Simply put: Some interview poses and body language convey greater confidence than others.

Qualifiers. The content of interviews can differ as well. Verbally, women often use qualifiers when they speak. They are more likely to sprinkle their responses with phrases like:

- "I don't deserve all the credit for that, of course ..."
- "I have not had that responsibility yet, but ..."
- "With more exposure in this area, I could ..."

It is rare that I see male candidates expend energy qualifying their precise involvement in a success. But many women, in sharing their achievements, go out of their way not to overclaim or imply a disproportionate role. I can almost see the wheels turning in their minds as they speak: "I have to be fair. I should not take credit for all of it."

They are correct, of course. No one deserves sole credit for past institutional successes. In addition to talent, drive, creativity, preparation, and effort, success arises through good fortune, skilled colleagues, good timing, adequate resources, and other factors. Belaboring all of that in a job interview, however, does not serve a candidate well.

Women who feel the urge to credit others at length during the interview might ask themselves: For whose benefit am I wading into this level of precision? What is it accomplishing? I am not advocating that candidates, by omission, claim credit for achievements that go beyond their efforts. Instead, briefly acknowledge the role of others but don't dwell on it. The interview is about *you.*

There are other behavioral patterns, too. When men are asked how they would handle a responsibility that is new to them, many tend to declare: "I can do that." Male candidates often come across more forcefully even where it's less warranted. Female candidates are more likely to convey humility about tackling a new duty – much like a colleague in my company did the other day, saying, “tell me if it seems I am driving beyond my headlights.” That sort of hedge, even if it’s true, does not come off well in a job interview.

Coaching the committee. Just as I advise candidates on how to interview well, I talk with committees about how to approach the interview process fairly.

The onus falls first on committees to keep in mind that different types of leaders present differently in interviews and that, while style is important, results matter most. Search committees must do a better job of recognizing the constraints of the interview process and the dangers of prejudging candidates or looking at superficialities. Committee members need to anticipate their own tendencies and biases. Here are some of the things I tell search committees.

- *Remember your charge.* The goal is to find people who will succeed in the position, not necessarily ace the interview. The creation of a comprehensive leadership profile (aka job description) is a necessary precursor to an effective committee. The purpose of the interview is to get to a point of collective confidence on the merits of candidates to continue in the recruitment process and ultimately to fulfill the written objectives of the role.

- *Don’t be too quick to judge.* As humans we form judgments in seconds. As search-committee members, our job is to give candidates the whole 75 minutes or more. The best candidates are not always the most skillful in talking about themselves. Sometimes they shine at the end of the interview ... or impress in nuanced ways.

- *Keep in mind that different people present themselves differently.* Be on the alert for unjustified overconfidence, or confidence masked by deferential motions or verbal qualifiers.

- *Consider the potential for double standards and double binds.* I recently had a committee member express concern about a female candidate who, he felt, used the first-person “I” too often. Would he have noticed that in a man?

- *Beware of dazzlers.* There are people who simply interview well (and sometimes those are the same people who can’t hold a job for long and so have had plenty of interview practice). Committees need to make sure to explore the depth of all candidates equally.

- *Look at the big picture.* Don’t just rely on notes from the candidates’ interviews. Also incorporate information gathered about them through thorough referencing, and behavioral and leadership assessments (which are increasingly being used).

Most of all, I talk with search committees about broadening their conception of leadership. Some committees genuinely want diversity, but do not necessarily want difference and become less enthusiastic when faced with challenges to their assumptions.

Others are receptive to the notion that they must rethink the traditionally masculine picture of a leader. A search consultant like me can approach those committee members and ask them to reconsider when they respond negatively (as happens surprisingly often) to a female candidate who comes across in a powerful way or who does not display the qualities they believe represent leadership.

Assuming responsibility. Sometimes the committee just needs a little explicit direction. That's where those overseeing the search should step up. Trustees or hiring officers intent on having difference well represented in the finalist pool would be well advised to:

- Consider gender and other differences before building your search committee. In particular, this is an area where adding a young(ish) staff member (professional-development opportunity?) can often make a big impact, especially when that person is both sophisticated about difference and willing to speak up in the committee room.
- Be clear in the leadership profile that candidates with a record of affirming difference will be valued in the selection process. Then be clear to the committee itself about the varied ways in which leadership can be displayed and the expectation that a strong finalist pool will include representation of more than one approach.
- Direct the search committees to select finalists who themselves value difference. To discern that, search committees must ask candidates to discuss examples that show how they have embraced difference and diversity through their own hiring and professional development of others.

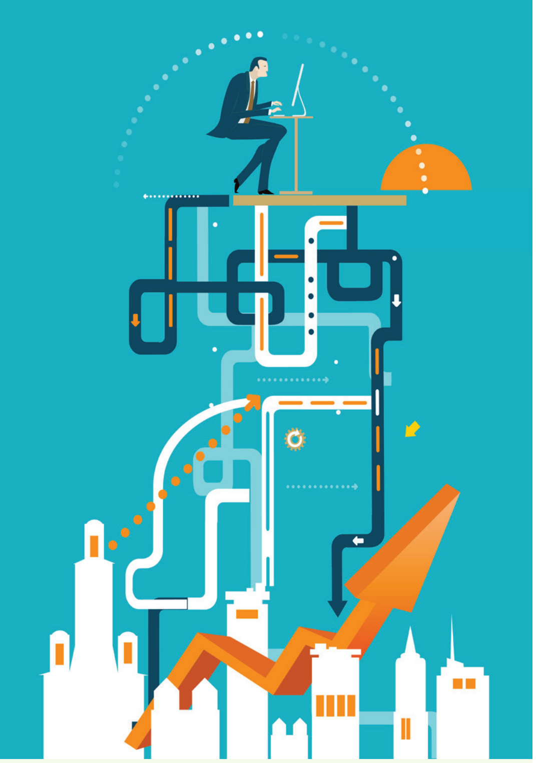
What candidates can do. Like all good search consultants, I know my candidates, men and women. When I know that someone qualified for a position will not present as strongly as they could, I provide counsel ahead of time. "There are some things we should think through before the interview," I will say.

One thing I communicate is that interviewing is its own genre and province. A typical 75-minute session is a finite exercise that has its own rules and customs that must be learned and mastered. Among the advice I offer:

- Think ahead of time about how you want to come across to the committee. Sit tall and don't apologize.
- Consider your reputation. No interview starts as a blank slate. Candidates' resumes and reputations precede them, for better or worse. Before you get in the room, think about what they might be questioning about you. You will want to find a way to respond.
- Start strong. First impressions are critical. It is hard to undo perceptions that are established in those first few minutes.
- Take credit. Be ready to highlight your impact and achievements by having anecdotes at the ready that illustrate how you have approached various aspects of the job.
- Show confidence and presence. Committees are thinking: "Is this the person we want leading our organization? Would I follow this person?"

All of us involved in the hiring process benefit from a greater awareness of potentially gendered language and behavior. It is imperative that search-committee members, in particular, recognize the effect their perceptions can have on gender equality in leadership. If we want more women to ascend to top positions we must make the time and space of the interview session one that is fair and aware.

[An earlier version of this article originally appeared in the Chronicle of Higher Education. Permission to republish has been granted.]



Replacing an Iconic Nonprofit Leader

By John Fazekas

Not-for-profit organizations are blessed when their executive director or CEO stays for a lengthy tenure. A leader who stays for 10, 15 or even 20 years usually means stability, respect and success around the mission. If wildly successful or even the founder of the organization, the individual may be deemed an icon.

The challenge arises when, ultimately, that leader decides to step down. Not only are there proverbial "big shoes to fill" atop the organization, but there is little organizational knowledge as to how to recruit a new top executive.

As a search consultant within the not-for-profit sector, I frequently encounter this blessing/curse dynamic when a long-tenured leader exits the stage. A few questions arise among board members or search committee members: *How do we replace an iconic leader? Do we recruit someone in the same mold? Where do we even begin?*

There are many relevant questions that crop up when an icon steps down:

- **Do we recruit someone in the same mold?** No, a clone of the former leader is not the answer. While there are qualities that made the previous CEO successful, the organization has grown, programs have been added and clients have changed. From a culture perspective, you want a leader who can preserve the values that make the organization a special place. Yet the new CEO will need to develop their own credibility and be true to their own personality.

  Odds are the new CEO will need to navigate a path that is quite different and may require skills and experiences that were not necessary years ago. With increased emphasis on fundraising, more collaborative ventures and the constraints that come from decreased reimbursements, the new CEO really has to fight for the resources that are necessary to sustain the business. These are priorities that demand a new type of leadership.

- **Will top candidates want to replace an iconic leader?** Absolutely, especially if the nonprofit has built a recognized brand and is seen as a leader in their

“Odds are the new CEO will need to navigate a path that is quite different and may require skills and experiences that were not necessary years ago.”

space. Even though there may be big shoes to fill, the strongest CEOs are looking for a chance to make an impact, not simply slip into a maintenance role.

That said, organizations underestimate how traumatic it is for staff to see a beloved leader move on. She/he may have been that inspiring leader that initially attracted many employees to the organization or has been the glue that kept staff there in tough times. A CEO successor, therefore, must be aware and respectful of what that leader meant to the organization even while new changes are being implemented.

- **What relationship should the CEO have with the board?** Strong CEOs learn how to form a strong relationship with their board. Many board members may have joined because of the previous leader and have loyalty to the outgoing regime. The board is putting its faith in this new leader and the staff is trusting the board to hand the reins to the right person. For these reasons, the new CEO must go out of his/her way to forge a strong relationship with the board. The CEO must over-communicate with the board and provide hard data as to why certain actions or changes are needed. There is a real opportunity at the outset of a CEO's tenure to effect change, but only if the executive's bond with the board is strong.

- **Can we afford the new CEO?** It is a competitive market and finding a leader who can put down roots and drive change requires nonprofits to view this hire as an investment in the future. Often times, boards realize they were getting a great deal in what they were paying a longstanding, iconic leader. While a passion for the mission is hopefully a big part of the new CEO's DNA, the reality is that this executive will have options and can command a higher salary than the outgoing leader. The board must account for this as it begins the recruitment.

Conclusion

The leaving of a long-term, iconic leader can breathe new life into an organization. But this will only happen if the board looks to the future as it selects a new leader, and if the selected CEO acknowledges the past and what the predecessor meant to the organization.

Effective CEO Transitioning and Onboarding

By Paul W.H. Bohne

Takeaways

An effective onboarding plan will focus on the following four general areas:

1. The organization
2. The individual
3. The network
4. The job and team

New leaders have a much greater likelihood for early and lasting success if they participate in a well-planned and explicit onboarding process. An onboarding plan for a new CEO, or any executive for that matter, is not "one size fits all." There is no standard formula or checklist. Developing an effective onboarding plan requires a detailed and honest review of the organization and the new executive.

I often see glazed eyes when the topic of onboarding is raised – for some, the term itself can be dismissed as confusing and/or trendy HR jargon. While transition plans can be as elaborate as an organization either desires and/or needs, there is a simple philosophy to remember to help keep this work in focus — *ensuring the right people are doing the right things at the right times to support a new leader.*

An effective onboarding plan will focus on the following four general areas:

1. The organization

The new CEO won't be able to effectively lead the organization without a firm and thorough understanding of the organization, its history, people, culture and short and long term priorities. Though a new CEO should have become very familiar with the public facts and figures as a candidate for the position, there is much more to be learned in order to assimilate effectively into the organization including the culture, the work climate, the internal organization, and political challenges.

Based on a thorough vetting of the leadership agenda and its priorities before and during the search, board leadership and the new leader should have explicit conversations about the desired rate and methods of change at the outset. I often recommend that a search committee function or several members of that committee function as a transition committee that is heavily invested in the success of new leader.

2. The individual

At the end of the selection process, based on interviews, references, social interactions, and the interpretation of formal leadership assessments, the board has a fairly clear picture of the new CEO's skills and behavioral tendencies.

Onboarding considers which of the new leader's skills and leadership characteristics will help and which could thwart the chance for success in the new position. A thoughtful plan will account for these and leverage the individual's strengths while addressing potential derailing behaviors or skill gaps early on in the transition through development opportunities, coaching and/or mentoring.

3. The network

The board is well positioned to guide the new CEO to establish strategic connections both within the organization and beyond, to key stakeholders from the local or regulatory community. A plan that helps the new executive to identify the individuals who are vital to the success of high priority initiatives, can serve as supporters, or possess subject matter expertise will speed the development of trusted networks and open communication channels with peers, supporters, colleagues, and board members.

4. The job and team

Last but in no way least important, the onboarding plan will clarify the specific, measurable expectations of the new CEO over the first year on the job. What do they need to learn about the organization, its history and most pressing priorities? What are the top priorities the CEO is expected to address, and what results are expected in 90, 180, 365 days? What are the potential threats or derailers? The answers to these questions will drive a plan that can lead to some early "wins" for the executive, and for the organization.

On a final note, successful transition requires a joint effort. Though the board sets the onboarding agenda and the transition period objectives for the new CEO, success ultimately requires mutual commitment from the board and the CEO.

[This article is excerpted from one that was originally published by Directors & Boards. Permission to reprint has been granted.]

Contact Our Authors

Mark J. Andrew
Senior Partner
marka@wittkieffer.com

Paul W.H. Bohne
Managing Partner and Practice Leader, Healthcare
paulb@wittkieffer.com

John Fazekas
Senior Associate
jfazekas@wittkieffer.com

Lucy A. Leske
Senior Partner
lleske@wittkieffer.com

Robin Mamlet
Senior Partner and Managing Director, Education
rmamlet@wittkieffer.com

Julie A. Rosen
Consultant, Not-for-Profit Practice Leader
jrosen@wittkieffer.com

Zachary A. Smith, Ph.D.
Managing Partner and Practice Leader, Education
zsmith@wittkieffer.com

Suzanne Teer
Senior Partner
suzanne.teer@wittkieffer.com

Andrew R. Trechsel
Senior Associate
atrechsel@wittkieffer.com

About
WittKieffer

WittKieffer is a global executive search firm dedicated exclusively to organizations that improve quality of life in healthcare, education, the life sciences and the not-for-profit sector. The company's industry-specialized consultants deliver solutions across the leadership continuum – experienced, emerging and interim – that build long-term partnerships and successful outcomes.

WittKieffer—leading the way forward for 50 years. Visit **WittKieffer.com** to learn more.