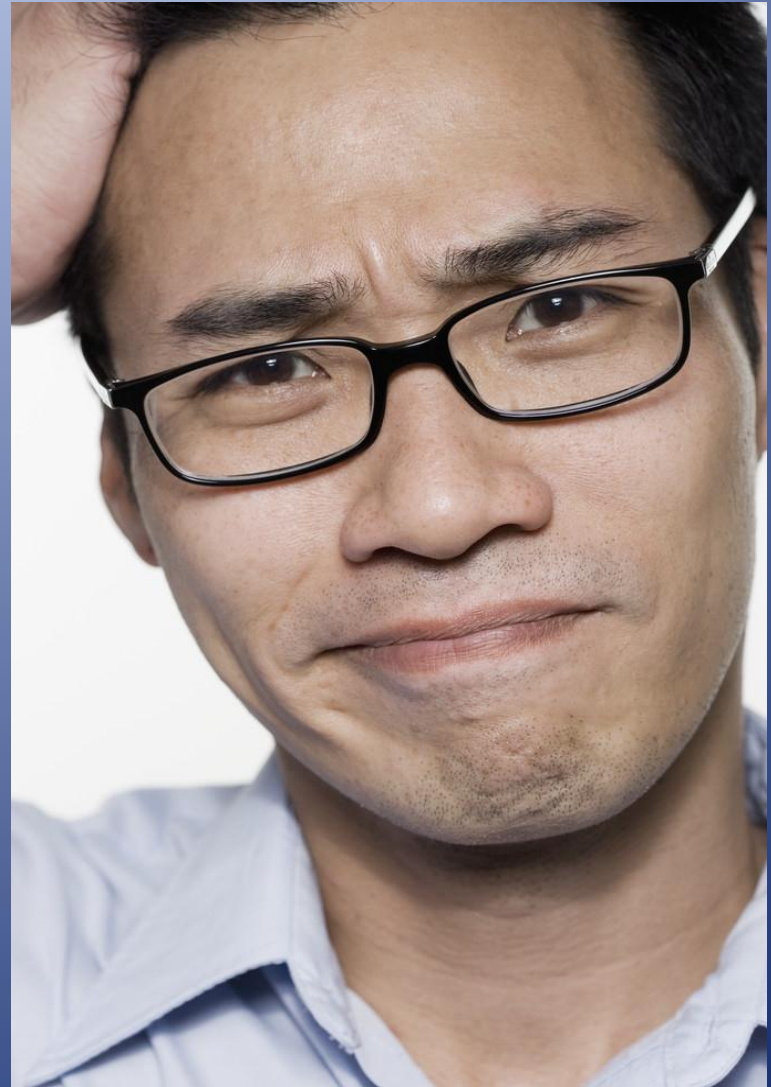


Searching for “the one”

Easy steps to conducting an executive
search process

Pat Libby, USD

Where do I start?



Decide who will be on the bus



Who will participate at what stage?

Things to consider

1. Who will screen the resumes? A search committee or the board as a whole?
2. Who will conduct the initial interviews?
3. What role will staff have, if any, in the process (i.e., helping to develop the job post, posting the ads/announcements, meeting candidates)?
4. How will internal candidates be treated?

Make sure everyone agrees



Develop a qualifications matrix

- Experience leading a senior management team
- Financial management experience
- Fundraising from individuals, foundations and corporations
- Fluent public speaker
- Board management experience
- Expert in our subject area
- Experience with press

Experience leading a senior management team

“Articulates, and is able to demonstrate through examples of direct experience, a management philosophy that vests considerable decision-making power within a management team while recognizing the ultimate power rests with him/her. Has led more than one management team.”

Research comparable pay



Where do I look?

- Center for Nonprofit Management:
Compensation and Benefits Survey for
Southern and Central California
- Trade association representing your field
- 990 search

Decide where and how it will be advertised

- Determine your budget
- Online websites
- Notice distributed through online contacts
- Telephone calls to prospective candidates
- Print advertising
- Internal posting

Write up the job announcement



Key elements of the job post

- History and mission
- Agency size and reporting structure
- Summary of the job/scope of work
- “Other duties as required”
- Qualifications
- Salary range + benefits
- Equal opportunity/affirmative action
- What, where, how and by when items should be submitted

Make recruitment calls



You are the ambassador...

DON'T

Sugar Coat



DO talk about why your nonprofit is
terrific!

When the materials arrive

Send *everyone* a response



Then...

- Compare the resumes to your qualifications matrix
- Is the cover letter thoughtful and to the point?
- Look for typos
- Rank and compare results with search committee
- Agree on the first, second and third set of interview questions

Interview questions – know the law!

You CAN'T ask...

- Birthplace
- Age or DOB
- Religion
- Race
- Height
- Marital status
- Kids
- Gender
- Disability

You can ask...

- Are you 18 years or older?
- Are you legally authorized to work in the U.S. on a full time basis?
- Which languages do you speak and write fluently?
- Have you ever been convicted of a crime? Are there any felony charges pending against you?
- Are you able to perform these (physical + other requirements) essential job functions?

The U.S. Equal Employment Opportunity Commission

Religious Organization Exception: Under Title VII, religious organizations are permitted to give employment preference to members of their own religion. The exception applies only to those institutions whose “purpose and character are primarily religious.”

Make sure the playing field is equal



Your job as an interviewer

- What are the current circumstances that find you conducting a search?
- Be clear about how the org. functions – what is the culture? What are the expectations of the position?
- Show them the workplace.
- Explain the timeline and process.

Some typical first round ?

- Please tell us about yourself and why you're interested in our organization.
- As a manager, how do you let people learn your expectations and standards?
- Please describe a difficult situation you faced as a manager and how you handled it.
- Do you have experience working with a nonprofit board? If so, how do you prefer to interact with a board?

More first round ?

- Is the salary range we're offering appropriate for you?
- If this job were offered to you would you accept?
- If this job were offered to you, when would you be able to begin?

Follow-up with good/bad news

And talk about next steps



Some typical second round ?

- If you were offered this job, what would you do first?
- What would you need to learn in order to do this job and how would you learn it?
- How do you distribute duties or otherwise work with a management team?
- What questions do you have for us?

Follow-up with good/bad news

And talk about next steps



Last round!

- What excites you most about this opportunity?
- What are your comments on our financial statements?
- What do you perceive will be your greatest challenge in this job?
- What is your vision of where we will be in 5 years under your leadership?

Reference checks

1. How long have you known this person and in what capacity (i.e., former supervisor)?
2. How long did s/he work for your org. (dates)?
3. Can you describe his/her job responsibilities?
4. What was his/her starting and ending salary?
5. What are his/her greatest strengths?
6. Greatest weaknesses?
7. How would people s/he supervised describe?
8. Would you (re)hire this person?

AND more checks! – Your insurance broker can help

Some organizations require formal background checks for example:

- DMV
- Credit Check
- Finger Printing
- FBI and DOJ
- Check credentials (i.e., did the candidate receive a degree from XYZ university).

Finally...

Don't forget to do a simple
google search to find out more
about your candidate!

Follow-up with good/bad news

And talk about next steps



Making an offer



Employment letter

- Job title and starting salary
- Copy of employee handbook is enclosed outlining your benefits
- You are an at-will employee – no oral commitments have been made concerning this offer.
- Please sign and return a copy of this letter.

Ensuring your future: Executive Search

Pat Libby, Clinical Professor and Director, Institute for Nonprofit Education and Research
January 2012

The following is a brief overview of the 10 key points of the search process:

1. Start by agreeing who from the board of directors will serve on the search committee and how other board members will participate. If you have a small board, the entire board may wish to participate in the search. Alternatively you may select a 3-5 member committee to conduct the first and second round interviews and invite the full board to participate in the final interviews. Be sure the search committee contains an odd number of participants in the event that you cannot arrive at consensus about the candidates. The staff should not be part of the search committee but may participate in the process as described in several areas below.
2. Begin the process by developing/revising the job description, much of which will become the basis for your job announcement (also known as a job posting). You may want to work on this with input from the current executive director and other senior staff (although no potential candidates should participate in this process). Be sure to include all those key duties and responsibilities that you will refer to later on to evaluate the performance of the chief executive
3. Discuss among the board what qualities/skills you are looking for in a candidate and how each of you prioritizes these qualities/skills. For example, do you all agree that fundraising is the #1 priority or is being an expert in your subject area a higher priority? You need to make sure you agree on what you are looking for in order to be sure that you're all looking for the same thing! Develop a qualifications matrix that you can use to evaluate candidates (a sample will be distributed at the workshop).
4. Research salaries for top executives serving organizations that are similar in mission, staff and budget (ideally, in this region). This information is generally available through organizations such as Nonprofit Management Solutions that purchase salary surveys. Alternatively, if you are a local chapter of a national organization or part of a network of similar organizations, those umbrella institutions are likely to have salary and benefits data.
5. Draft the job posting. Make sure it contains a paragraph that describes your organization (mission, when founded, how many staff, budget size), duties, qualifications, salary range/benefits overview, equal opportunity statement, deadline, and to whom and how resumes should be submitted. **DO NOT OMIT THE SALARY RANGE** as this will only make your job more difficult! You may attract a wonderful candidate who is earning 25% more than you're paying which would waste everyone's time.
6. Decide where to post the position. This is likely to include distributing it through your electronic and snail mail networks (i.e., at other nonprofits that do similar work), at nonprofit job internet sites such as NP Works through Nonprofit Management Solutions and Idealist.org, and perhaps through print media. If you have a limited budget, map out all of the options and decide which ones will give you the biggest bang for the buck.
7. Brainstorm with your group about specific names of individuals you want to recruit for the job as well as those who are prominent in the field who may have ideas about good candidates. Then get on the phone! Don't be shy about recruiting people you think would make excellent candidates. Be honest about the situation that the organization finds itself in. For example, if you have major cash flow issues, are in the midst of a law suit, or have another major problem, disclose the general nature of the situation to the people you are recruiting (otherwise they will feel misled).
8. Prior to the interviews:

- a) Decide on whether you will allocate funds to bring in candidates from out-of-town (you would need to provide, airfare, transportation and hotel accommodations), and whether you have a moving allowance in the event that an out-of-town candidate is chosen for the position.
 - b) Agree on a target number for initial candidates to be interviewed (generally 10-12 for the first round), 5 for the second round and no fewer than 3 during the last round. Why no fewer than 3? You do not want the board polarized between 2 candidates.
 - c) Use the qualifications matrix to screen the resumes. Agree on a procedure for selecting candidates to interview if there is a difference of opinion among committee members.
 - d) Draft a series of questions for 1st, 2nd and 3rd interviews (sample interview questions will be distributed at the workshop). Agree who among you will ask the questions and how long the interviews will last (suggested: 45 minutes for the first round and 1 hour each for the subsequent rounds). Be sure that during the second interview you ask "Would you accept this job if it were offered to you?" That way you'll be able to find out whether someone is serious about the position. Also, be sure to consult a source such as NOLO press, *The Employer's Legal Handbook* to ensure that all of the questions you plan to ask are legal (for example, you may not ask a person's age, religious affiliation, marital status, disability status etc.)
 - e) Decide how you will respond to the applicants at each stage of the process. It is suggested that you send a letter to all applicants informing them that you have received their resume, thanking them for their interest, and letting them know that if they have not been contacted by X date, they will not be receiving an interview. The board chair should be designated to call those candidates you choose to interview after each round of the process to let them know whether or not they have been selected to advance. The board chair should also be designated to make a job offer to the finalist.
 - f) Make a commitment that all committee members must participate in all interviews in order to be able to vote for a candidate. How can I judge whether Juan is better than Jose and Betty if I didn't attend Betty or Juan's interview?
 - g) Decide what process you will use to vote on the candidates after each round or whether you will make a consensus decision. It is suggested that you discuss each candidate after their interviews and, for the first 2 rounds of the interview process, ask each board member to anonymously rank the top 3 candidates on a secret ballot. For the final round, have an open discussion about the candidates and then ask each member to rank each of the 3 candidates in order of priority.
 - h) Decide if and how you plan to involve the staff or senior staff in the process. For example, you may decide that you'd like to provide the opportunity for the senior staff to meet with the 3 finalists which would provide a chance for the candidate to meet the team and visa versa. Remember though: hiring is the single most decision made by the board – it is NOT a staff decision. These meetings would be to allow an exchange of information between the parties.
9. For the interviews:
- a. Make sure that all interviews are given in the same format. For example, if you choose to interview 10 candidates during the first round and 3 of those candidates live out-of-town, interview ALL first round candidates by telephone (even ones that may be working around the corner). That way it's a level playing field for all involved.

- b. Make arrangements for introducing out-of-town candidates to your area. Some organizations ask a local realtor to be available to provide a tour of the area housing market.
 - c. Think through the logistics of who will greet the candidates and escort them out.
 - d. If you decide to interview out-of-town candidates, it is suggested you conduct the 2nd and 3rd interviews on back-to-back day to minimize travel costs. For example: the board may interview 5 candidates on Wednesday and bring back 3 candidates for final interviews on Thursday afternoon. Staff could have the opportunity to meet individually with each of the finalists on Thursday morning.
10. Once you've selected the candidate
- a. Put the offer in writing and agree on a clear start date. The NOLO book has a sample employment letter.
 - b. Make a plan for introducing the new executive to the staff and to the broader nonprofit community. You may want to issue a press release, host a special event for funders, and/or host an open house for the general public.