

# PRESIDENTIAL & EXECUTIVE SEARCHES:

**Everything You Need to Know to  
Manage Them Successfully**



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## THE BIG PICTURE

An *opportunity* to think about the *future*.

The power to *unify, galvanize,* and *inspire* a campus community

A *complex* and *high stakes* operation that will have a tremendous impact on institutional *momentum* and *success*.



### The Big Picture

A successful presidential search is an opportunity for an institution to think about the future.

A presidential search process has the power to unify, galvanize, and inspire a campus community as it calls all the institutional constituencies to come together to assess the current state of the college/university, share their values and priorities—and articulate what they hope for the future.

A presidential search is a complex and high stakes operation that will have a tremendous impact on institutional momentum and success.

## QUALITY AND SUCCESS IN EXECUTIVE SEARCH



Organized, professional and strategic

Open and transparent process

Confidentiality for candidates

Affects institutional reputation:

- Treatment of candidates
- Position prospectus as a marketing tool

### WHAT QUALITY AND SUCCESS LOOK LIKE IN HIGHER EDUCATION EXECUTIVE SEARCH

Organized, professional, transparent, and strategic

Open in process while highly respectful of candidates' confidentiality

The perception that the search has been consultative and transparent will enhance the probability of success for the new president.

**Institutional Reputation:** How you run the process will have an impact on your institution's reputation.

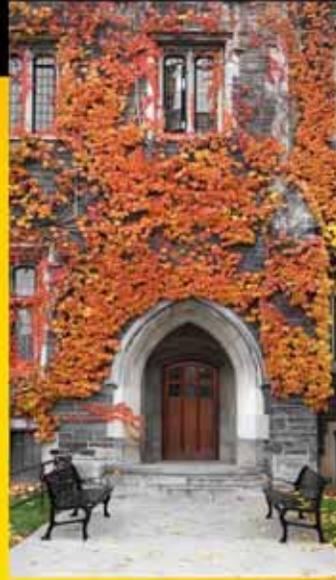
**Marketing Opportunity:**

If recruiting is done properly, then leaders in higher education across the country and internationally will be made aware of the institution and the search--and contacted for their ideas and nominations.

The leadership prospectus is a marketing as well as a recruiting tool—be sure that it is attractive and professional. It will go out to many hundreds of higher education leaders and candidates.

## PREPARING

- Board policies:  
who is the hiring authority
- Politics of hiring a senior person
- Scrutiny and curiosity of the campus community and alumni
- Barrage of input
- Importance of campus listening sessions and alumni consultation



### **What the Presidential Search Chair (who is usually a trustee) may not know and needs to be prepared for:**

Are there any board policies that impact the search process?

How political it is to appoint the search committee

The intense scrutiny and curiosity campus and alumni constituencies will have in the search

The barrage of input that the Chair will receive—everyone has an opinion

The importance of campus listening sessions and alumni consultation at the beginning of the search

The importance of regular communication about the search to the campus and alumni

The importance of being clear about the process for decision-making and appointment (the Board makes the final decision)

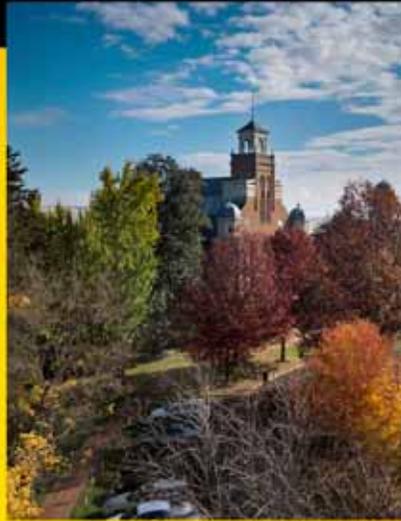
How much the campus schedule will affect the presidential search schedule.

The importance of managing expectations about public or private finalist interviews

That many campus members will expect and even think they can demand open public interviews of finalists.

## PREPARING

- Importance of regular communication
- Importance of being clear about the process for decision-making and appointment
- The campus schedule will affect the search schedule.
- Managing expectations about public or private finalist interviews



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That many campus members will expect and even think they can demand open public interviews of finalists.

## SEARCH FIRMS



- Enormous impact of a search
- Your institution likely only conducts a search every 6-8 years
- Search consultants have established, professional approach and expertise
- The search firm should bring value-added in recruiting

### **Considerations on whether and how to choose a search firm**

Institutional stability--and momentum—are impacted enormously by a presidential search and transition

Your institution conducts presidential searches only every 6-8 years.

Your search consultant conducts executive searches for a living and will have an established, professional approach and expertise to assure a successful hire and a respected process

Your search firm should bring value-added in conducting active recruiting in their broad networks

## STAFFING EXECUTIVE SEARCHES



- Fit between consultant and staff
- Keen insights
- Build a relationship with the successful candidate
- Liase between search committee, chair & consultant
- Staff organizes and oversees the finalist interviews.

### **How to staff presidential/executive searches**

Assign an executive staff member to support the Search Chair and liaise with the search consultant and his or her staff

The staff will see the candidate outside the formal interview and develop keen insights into the working style and personality of candidates

The staff can use the search process to build strong relationships with the eventual successful candidate

The staff member can awkwardly be stuck between the Committee and: the campus, the Board, the candidates, and the outgoing Executive

Finalist interviews—the campus organizes and conducts these

## BASIC STEPS

1. Develop a realistic time line: typically 4-5 months
2. Identify search chair and the staff to the committee
3. Develop a communications plan
4. Appoint search committee
5. Develop the charge to the search committee
6. Educate the committee--process & expectations

### **The basic steps in an executive search**

Develop a realistic timeline: takes 4-5 months

Identify Search Chair—a respected board member who has the time, patience and wisdom to lead a highly complex and politicized process (what about other searches)

Identify the staff to the Committee—respected executive who can put in the time required.

Develop a Communications plan, to include a presidential search webpage. When possible begins before the announcement of the departure and goes into the transition

Appoint search committee

Charge to the Committee—open vs closed; search vs selection, make clear who makes the final decision; if search, how many finalists shall the committee recommend to the Board; role of committee in Finalist interview stage;

Educating the committee: Confidentiality Agreements, HR policies, interview techniques and protocol.

## BASIC STEPS

7. Set a realistic schedule far in advance
8. Consult with constituencies
9. Build the position prospectus
10. Advertise
11. Recruit
12. Review of applicants

### **The basic steps in an executive search**

Set a do-able schedule far in advance and make clear committee attendance is crucial for the key meetings.

Build the prospectus. A good prospectus identifies the priorities for a new president while giving background and history on the institution. It also shares expectation for qualifications (are non-traditional candidates ok, is there a religious expectation etc)

Consult with campus—open fora, alumni outreach

Advertise

Recruitment—8 weeks at minimum

Review of candidates: Confidential access of search committee to candidate materials, applicant review form,

## BASIC STEPS

13. Semi-finalist interviews—in person or by Skype?
14. Reference checks, media reviews, confirmation of degrees and employment
15. Finalist interviews
16. Credit and criminal checks for the appointee
17. Announcement—carefully choreographed
18. Transition

### **The basic steps in an executive search**

Semi-finalist interviews: Off-site, confidential (“airport interviews”), site selection, candidate coordination, standard questions, applicant rating form, room set up (water for candidate, name plates), materials to be sent to candidates, interview schedule, role of consultant

Reference checks (when and by whom), media reviews, confirm degrees and employment

Finalist interviews—hospitality, consideration. Balance evaluation with recruitment—and remind everyone on campus to do the same, role of the committee, schedule, spouse/partner involvement, role of the campus, community feedback

Credit and criminal for the appointee

Announcement- coordination with candidate’s current institution (and alma maters/associations), Media/PR, Development calls, Constituent meetings (if on campus), Developing future media package (if on campus)

Transition—see Scott Miller’s presentation tomorrow.

## THE BIG DEBATE: Open vs Closed

The crucial balance amongst conflicting values:

### OPEN

- Respect for shared governance traditions
- Campus members' unspoken expectations that presidential finalist interviews are "always" open and public
- Insatiable campus curiosity

### CLOSED

- Protecting your best candidates

### Current trends in interviewing finalists—public vs. private

The crucial balance amongst conflicting values:

respect for shared governance traditions  
campus members' unspoken expectations that presidential finalist interviews are "always" open and public  
that insatiable curiosity we have mentioned, and  
keeping and protecting your best candidates

## THE BIG DEBATE: Open vs Closed

### Balancing Priorities

- Sitting presidents have lost their positions when it was discovered they were interviewing elsewhere.
- Social media has transformed the meaning of “public” interviews
- It can be to the new president’s detriment if the campus believes the process was not respectful of shared governance traditions.

### Current trends in interviewing finalists—public vs. private

You can lose exceptional candidates, especially sitting presidents, if they feel they will be exposed as one of three or four finalists.

Sitting presidents have lost their positions when it was discovered they were interviewing elsewhere.

Social media has transformed the meaning of “public” interviews—with videos and blogs and tweets evaluating each candidate as they come it

But, it can be to the new president’s detriment if the campus believes the process was “flawed” and not respectful of shared governance traditions.

## Conclusion



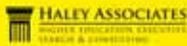
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