NONPROFIT GUIDE

Executive Director Search Process

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JUNE Partners is a retained executive search firm that specializes in searches in higher education, academic medicine, and nonprofit organizations. More information can be found at www.junepartners.net.

Introduction

One of the most important roles and responsibilities of a nonprofit board is to hire, manage, review, and appropriately compensate and support the Executive Director.

A time of leadership change can be challenging, but it is also a time of opportunity. Having an informed, engaged, and committed search committee and board helps ensure the organization addresses challenges and mitigates risks, while realizing opportunities that the change allows.

Often, a board will make the wise investment of retaining an executive search firm for the recruitment process. This can be an expensive proposition, though, and not one all nonprofits can afford. This guide is meant to help a nonprofit board realize the opportunities of hiring its next Executive Director, while ensuring a fair, equitable, and inclusive process. It can be used to help understand the process while working with a search consultant, or for managing the search independently.

Please note, this guide does not represent legal counsel, and the decision for hiring is in the hands of the search committee — and, ultimately, the board. This guide is intended as a tool for reflection and planning through the process.

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1. Establishing the Search Committee

The board of directors holds responsibility for recruiting, hiring, managing, and (if needed) separating with the Executive Director. The board will often charge a search committee in overseeing the process, though all members of the board hold final responsibility.

Diverse Perspectives:

The search committee should be composed of board members who can offer diverse perspectives on the role and hiring process. The search committee should also reflect the diversity of the community being served and of the candidate pool you are hoping to attract.

Often, non-board members will be invited to participate on the search committee, including as an opportunity to diversify the committee. Search committees can expand to include a donor, a client, or other close and trusted stakeholders. If expanded, the search committee should still be a majority board members — including, ideally, the current or incoming board chair.

There is a movement to decrease the hierarchical structure of nonprofit organizations by including staff more fully in the hiring process and on the search committee. However, there is tension in engaging staff members on the search committee as there may be a conflict of interest in hiring one's supervisor. This is an evolving conversation, and an important consideration to grapple with.

Once someone has joined the search committee, they should be excluded from future candidacy. This should be explicitly communicated with the invitation to service.

Importance of Confidentiality:

All search members should be clear that the process must be held in strict confidence. In some circumstances, candidates may risk their current jobs and relationships with their candidacy. Any indiscretion on behalf of the search committee can do real and lasting damage to the reputation of the nonprofit as well as to the careers of the candidates. Honoring the importance of confidentiality is important for mitigating risk and liability. The committee should be very clear in communicating with candidates — and seeking permission — before checking references (formally or informally) or in any other way disclosing their candidacy.

Clearly Defined Roles:

Clarity on roles, responsibilities, expectations, and commitment are important.

2. Designing the Communications Plan

The goal of the communications plan is to keep stakeholders informed about the executive director search process and to engage stakeholders in providing input and feedback on the desired qualities for the new Executive Director.

Thoughtful communications and stakeholder engagement will create relative transparency and build trust throughout the search process. Key messages would include the commitment to finding a qualified leader who aligns with the organization's mission and values as well as the importance of stakeholder input in shaping the search process and candidate selection.

It is important that there is clarity that much of the search process must be confidential in order to attract the best candidates. This need for confidentiality can create anxiety among staff and stakeholders who (by design) will not know the details of what is happening. Communicating what you *can* along the way can help alleviate this concern.

Things that can be communicated include how stakeholder feedback is being considered, the job posting and advertisements (with encouragement to share widely to attract candidates), updates on when the board will interview candidates, and how stakeholders might be engaged with evaluating finalists.

Audiences to Consider in the Communication Process:

- **Staff:** Ensure they are aware of the process and feel involved in the selection of their new leader, even as they understand the hiring decision to be a board responsibility.
- **Clients/People Impacted by the Nonprofit:** Keep them informed about the search process and how it may impact services and programs. Make sure that their voice is heard and perspective honored.
- **Funders and Donors:** Communicate the organization's commitment to finding the best candidate to lead the organization and listen closely for their insights.
- **Board Members:** Provide regular updates on the search process and seek their input on key decisions.

Communication Channels That Can Be Utilized:

- **Email Updates**
- **Website Updates**
- **Social Media** *(Note that If you do not regularly post on social media you should be sure you have a plan for monitoring responses appropriately)*
- **Staff Meetings**
- **Community Meetings/Forums**
- **Newsletters**

2. **Designing the Communications Plan**

(Continued)

The board should consider what key conversations need to happen before public communications. Have key funders been contacted? Do collaborators know? There is the chance you might frustrate or alienate a key partner if they hear of the transition through the grapevine rather than directly.

A few targeted early emails and calls can help steward important relationships for the organization and help key stakeholders feel closer to the organization.

In the initial communication — including emails and/or press releases — the format of the announcement often includes: announcement of retirement/departure; celebration of accomplishments under outgoing leadership; announcement of how the search process will be managed and if there is any interim leadership; a contact email for any feedback or recommendations to inform the process.

3. Understanding the Opportunity and Engaging Stakeholders

During a time of executive transition, it is important to understand the organizational goals, challenges, opportunities, and threats, so that you can orient your hiring to align with the opportunity at hand.

Establishing Priorities:

If you had a real funding deficit, for example, you would prioritize a leader with strength in fundraising. If you feel there were significant human resource issues, you would hire a leader with strong management and leadership skills.

In some circumstances, it makes sense for a board to delay the search process to ensure they understand the strategic priorities. In these cases, having an interim leader can provide the opportunity to do strategic planning work.

In many cases, organizations know enough to confidently move forward in hiring. This is especially true if the board can confidentiality endorse the organizational mission statement and if there is a strategic plan that aligns with the mission.

Determine What Success Looks Like:

Ultimately, the board must know what success for the new Executive Director looks like. To effectively accomplish this, the board must understand what success for the organization looks like.

When there has been a long-standing leader, some of the identity of the organization and the individual may become enmeshed. In these cases, care must be taken that the position description is not just a response to the leader that has been (for good and for bad), but to the opportunities that the organization faces ahead.

The new Executive Director *will* be different from the current Executive Director. Having clarity on what success for the new Executive Director looks like will be important so they are not judged just as a result of being different from what the organization is familiar with and used to.

This pre-planning dovetails closely with the communications plan as you will want to ensure key stakeholder perspectives are solicited and considered. These voices will be important in understanding the skills and experiences most important in the next Executive Director.

3. **Understanding the Opportunity and Engaging Stakeholders** *(Continued)*

Opportunities to Engage Stakeholders:

- **Meetings:** One-on-one and group in-person meetings. These would be important for key funders, key collaborative partners, and leadership staff members.
- **Surveys:** Surveys allow anonymous input. Sometimes offering critical feedback is really challenging. There is an opportunity to increase diverse perspectives by offering different tools to provide the feedback - including surveys (such as you can make for free with Google or SurveyMonkey) that allow for anonymous feedback to be shared with the board.
- **Forums:** Forums for staff, clients, and community members — in person or via zoom/online.
- **Email:** Allowing any interested party to share their thoughts directly with one point person on the search committee who will collate the feedback and share it with the search committee and board.

Occasionally, this process of inviting input can yield surprises about the organization. Being prepared to handle delicate concerns with discretion and sensitivity is important.

Questions That Can Be Asked of Stakeholders:

- What do you think are the greatest strengths of the organization?
- What do you think are the greatest weaknesses and opportunities for improvement?
- What do you think are the most important skills and experiences for the new Executive Director?
- Is there someone you would like to nominate for the role of Executive Director?
- What else do you want the search committee and board to know as they undertake this process?

Once the position description is drafted, it is a good idea to share it with leadership staff before it is shared externally. This gives staff the opportunity to respond and feel included and engaged.

Once the position description has been finalized and is ready to be shared, it should be emailed to all constituents and stakeholders so that they can also share it broadly in their networks.

4. Creating the Position Description

The position description is a marketing tool that is meant to attract qualified applicants. The language should be positive and encouraging, while providing a clear scope of requirements and expectations.

Clarity in the requirements is important in developing a consistent and equitable process. Tips to consider when reviewing and writing the position description are below.

Language and Tone Matter:

- Use clear, concise, and inclusive language in the position description.
- Be positive and truthful in describing the team, organizational culture, and community.
- Run the description through a gender decoder tool to ensure gender-neutral language. This is helpful as studies demonstrate that "male-coded" language will attract a disproportionately male candidate pool. You can access a gender decoder and read more about the impact of gendered language in hiring [here.]

Align with Mission and Values:

- Clearly articulate mission, vision, values, and commitment to diversity.
- Highlight the impact the Executive Director will have on achieving organizational goals, tying it into the mission, vision, and values.
- Include a statement encouraging candidates of different backgrounds to apply.

Transparent Expectations and Requirements Are Important:

- Thoughtfully describe the actual skills, experience, and abilities required for success.
- Consider what skills and experiences may demonstrate the ability to do the job even if the candidate has not already done the job - this is especially important as you consider candidates who are coming from less resourced communities and organizations.
- Avoid unnecessary requirements, including degree requirements, if not essential for doing the job; focus on skills, abilities, and experiences. This helps ensure an equitable candidate evaluation process and attracts a broader candidate pool.
- Offer clarity on how success will be measured.
- Be transparent about the compensation range and benefits. Publishing the compensation range is best practice for equity and inclusion. It also helps to ensure that the process does not come to a finalist only to find out there is an enormous gap in compensation expecation late in the process. In some states and cities, laws require this transparcy.

Once the position description is drafted, share it internally with staff and human resources for review before advertising and sharing externally.

5. Developing the Recruitment Strategy

Once you have the position description, it's time to market the role and accept applications. Below are strategies for creating an equitable process and generating a broad and excellent candidate pool.

Activate Broad and Diverse Networks:

- Encourage board members, staff, clients, and community members to share the position description in their networks.
- Search committee members should share the position description in their networks, with colleagues, and on professional listservs or LinkedIn Groups that may be relevant for the role.
- Committee members should be thinking not only of potential candidates they know, but people in their networks who can help spread the word about the opportunity to their colleagues and professional connections.
- Specifically and deliberately consider networks that engage diverse constituencies.
- Do not be afraid to cold call, especially to engage new and diverse networks. For instance, look at speakers at related conferences; many will be in roles where their work email is visible online; email them the position description and invite them to offer nominations and/or share in their networks.
- The search committee members should have a plan for who will follow up with any candidates that are recommended.

Candidate Application Materials:

- Require the same application materials from candidates at the same stage of the process —most likely a resume and cover letter to apply.
- Invite candidates to explore the role. Search committee members can be willing to have exploratory conversations if asked. It might be helpful if the committee has a list of talking points and/or a way of gathering questions that candidates ask to be sure the committee is consistent in the information you are sharing.
- Any pre-application recruitment conversations should be confidential, truthful, and encouraging. However, these exploratory conversations should not be considered as part of the application process.
- Do not move forward interviewing a candidate until all required materials are received and evaluated.

5. **Developing the Recruitment Strategy**

(Continued)

Advertising Timeframe:

- Remember there is a balance in timing: too little time advertised, and you may not get as large or robust a candidate pool; too much time and you may lose the candidates that applied first.
- Sample language for the position description:
  - *To ensure your candidacy is given full consideration, apply by [date/at least three weeks from when posted]. The position will be open until filled, and applicants may continue to be considered after this date.*
- The committee should acknowledge all applications received each day. To streamline the process, you can say you will only follow up with promising candidates, with language such as:
  - *Thank you for your application. We expect to review all materials by [date that is a few days after you plan to finish your review]. We will be in touch if you are invited to move forward at that point.*

Considering Internal Candidates:

- The search committee should be prepared to accept applications from internal candidates as well as external candidates.
- If an internal candidate approaches the board or search committee about applying, they should receive a response along the lines of:
  - *You are welcome to apply and if you do so, your candidacy will be given the same careful consideration as external candidates. Also, we will respect your confidentiality as we do with other candidates.*
- The committee should be prepared to evaluate internal candidates as you would external candidates. If there is an uncertainty about whether they should progress, you should err on the side of including the internal candidate in the pool moving forward. Your organization may have existing policies around how to handle an internal application.
- If an internal candidate does not move forward in the process, the search committee should take care in communicating their appreciation for their application and hope that they can continue to grow into additional leadership with the organization. Remember, though: the new ED will be in charge of managing staff, so the board can not make too many promises regarding their future with the organization.
- Know that sometimes an internal candidate who does not get the job will be ready to move on from the organization. While not generally ideal, this transition can be healthy. Treating the candidate with respect, appreciation, and confidentiality through the process can help in retaining them if they do not get the Executive Director role.

6. Evaluating Candidates

Once applications are received, the evaluation process begins. By definition, this is a process of making qualifying judgements in assessing candidates.

It is important to consider your own personal biases to help mitigate them in the process. Having clarity on the priorities for the role, the key skills and qualifications, and how you plan to consistently evaluate candidates on what matters is very important. All candidates should have the same evaluation process, whether they came from a personal recommendation or referral, an ad application, or are an internal candidate.

Consider Personal Biases:

- Remember – we all have them! Biases are normal and the flipside of a helpful skill of judgment that allows people to create categories to process information quickly and move through their days efficiently.
- Learning about different types of biases that come up in a hiring process can help mitigate the effect, including through resources like this. While we may go into an interview process prepared to check biases related to gender, race, age, or ethnicity, there are other types of biases that seep into processes. Common hiring biases include:
  - **Affinity Bias:** The natural inclination to understand and appreciate candidates that are like you. This relates to race, ethnicity, gender, as well as family structure, schools/colleges attended, sports played, and shared experiences. This is often compounded when looking for a "culture fit" versus a "culture add."
  - **Confirmation Bias:** Sometimes we make a judgment quickly, and then look for confirmation of what we are thinking. This can impact a resume review or interview, and it also leads to asking reference questions that are unconsciously leading to the confirmation of what we already think or value.
  - **Horns/Haloes:** This is the tendency to hold onto one thing that is a red flag (a horn) or one thing that is impressive (a halo) and allow that to impact the rest of our evaluation. For instance, if you have a particularly strong aversion to a specific university, seeing that on a resume may lead to the horn effect, where you discredit other skills, experiences, and competencies in light of the affiliation.

Candidate Evaluation Tools:

- To mitigate biases, make sure all candidates are being assessed on the qualities and characteristics most important for success in the role.
- Design the evaluation tools *before* you begin assessing candidates.
- Start by listing the most important skills and characteristics for success in the role, which should be reflected in the position description already. Then consider any additional experiences that would be nice to have, but not necessary.
- There are often compromises in the hiring process, so consider what skills and characteristics you can train for, and which must be demonstrated prior to hiring.
- This list is the foundation for your evaluation rubric, and for how you will read the materials and format the interview process.

6. **Evaluating Candidates** *(Continued)*

Virtual Interview with the Committee (First Round Committee Interviews):

- Generally, after selecting candidates from the resume review the search committee will invite candidates for a video interview with the committee.
- At this stage, the committee should pause and assess if they will have a candidate pool that is excellent and diverse. If not, do not rush to the interviews, but spend more time on outreach and building the pool. Communicate with candidates already engaged accordingly to keep them informed of the process.
- Develop a standardized process through which the candidates meet with the same group of people in the same order and/or context.
- Make sure that candidates receive the same preparatory materials at the same time in the process.
- It is okay if there are minor differences due to unforeseen circumstances – such as a staff absence on the day of the interview.
- Significant differences should be mitigated in the design: for example, you should host video interviews with all candidates at the same stage, even if there is an internal candidate.
- While you can identify an ideal number of candidates you want to interview as a committee (often 7-8), it is better to have initial interviews with more rather than fewer candidates. This is especially true if you have the opportunity to further diversify your candidate pool with additional interviews.

Interview Questions

- As you start the interview, be sure to thank the candidate for their time, introduce yourself, and confirm the role you are discussing and their application.
- Give the candidate a brief overview of the interview (about how long it will be, if they will have time to ask questions at the end), and what comes next in the process.
- Ask the candidates the same set of questions.
- Make sure that the questions you ask align with the qualities and characteristics you are looking to evaluate.
- Do not ask questions outside of the scope of the role.
- Specifically, do not ask questions about personal identity which includes family structure and composition, race/ethnicity, religion, and gender.
- It's always a good idea to refresh your memory on acceptable and unacceptable questions. Keeping to acceptable questions allows for a more equitable and inclusive interview process, and protects you from potential litigation. The online jobboard resource, betterteam, published a helpful chart of permissible interview questions that can be accessed here.
- Listen for answers beyond the question you asked. For example:
    - Does the candidate talk about collaboration when describing how they solved a problem
    - Does the candidate demonstrate integrity (or lack of it) when describing how they managed a conflict?
    - Do you hear an orientation to building and supporting diverse and inclusive teams when they talk about budgeting?

6. **Evaluating Candidates** *(Continued)*

- It is okay to ask follow up questions that are different from one candidate to the next; there may be a part of their candidacy you would like to clarify from their materials or answers that are unique to their consideration.
- Leave time for the candidate to ask questions of you at the end. This is helpful for their recruitment process, but also will allow you to learn a lot about them from the questions they think are most important to ask.

In-Person Meetings with More Stakeholders (Finalist Stage):

- After the video interviews, the committee should plan to invite finalists to meet with additional stakeholders. This will often be a series of meetings that take place over a day or two. Occasionally, it can be a mixture of in-person and virtual meetings.
- When inviting the candidates, be proactive in sharing that travel expenses (including mileage) will be reimbursed. It is highly recommended that the board does invest in travel reimbursement as this might be an inequitable hardship for some potential candidates.
- In planning the finalist interviews, make sure you are clear with the candidates on their level of comfort with exposure as in-person visits with additional stakeholders may make it more difficult to protect confidentiality.
- Stakeholders to engage would include: staff representatives, leadership team, and board members.
- If the outgoing Executive Director is still with the organization, the candidates may want to hear their perspective as well. With all stakeholders - but especially the outgoing Executive Director - it is important that the board is clear that while feedback is appreciated and considered, the responsibility for deciding who will be hired rests with the board.
- It is important for the search committee to have a way to solicit feedback from the stakeholders so that they can offer their perspective on the candidates. Often, a survey tool is ideal as it allows quieter voices equal consideration.
- All stakeholders should be reminded that these interviews are both for candidate evaluation and also recruitment. Their honest and (as much as possible) enthusiastic engagement is important.

7. Conducting References

The search committee should consider conducting “preliminary references” on candidates in the finalist stage – generally two to three references for two or three candidates.

At this point, you still have time to allow the reference insights to impact your decision-making, while not exposing candidates too early in the process or requiring too much investment of time.

- Do not speak to references without telling the candidate you are doing so.
- Once you have identified a finalist candidate and are prepared to extend an offer, you can begin negotiating the compensation, being clear that any offer is contingent on the successful completion of final references and anything else the organization requires such as background checks and/or drug screening.

Who to Talk To:

- Do not talk to references not provided by the candidate without permission to go “off-list.” When asking to check references the candidate did not provide, ask the candidate if there is anyone they prefer you do not contact – and listen to their request. It is okay to ask the candidate why they do not want you to contact the person/people if they don’t immediately disclose this.
- Consider what perspectives you need. Is the person’s reference list diverse in terms of roles and perspectives?
- If the candidate has significant professional work history, you will ideally speak with at least two people who have served as direct supervisors for the candidate. It is not unusual for a candidate to ask you not to contact their current direct supervisor until the negotiations are otherwise complete.

What to Ask

- In referencing, like in the interview process, it is important to stick with questions that are relevant to the job.
- Remember: Like every stage of the process, the referencing stage can introduce biases. This can include biases in how you ask questions or interpret answers, especially relevant in considering confirmation bias, discussed earlier. Sometimes we ask questions to get the answers we want to hear.
- Bias can also be from the person who is offering the assessment. The reference is providing an opinion about another person’s professional accomplishments and skills, and opinions can reflect the conscious and unconscious biases we all have.
- Take notes during your call and keep these with the candidate information as part of the hiring record.
- If the reference you are talking to offers information that is inappropriate for consideration in the hiring process (family situation, race, religion, etc.) do not consider the information in your decision making and do not write it down.
- Remember the full value of the reference process: reference calls can be great tools in deciding who to hire—and in preparing to manage or mentor the staff that you are hiring.

8. **Extending the Offer**

When to Make the Offer:

- After preliminary references are completed, you can move to the offer stage.
- Before extending an offer, take a moment to reflect:
    - If you have a strong candidate pool, are you confident your chosen candidate is the top choice based on skills and experience?
    - If you do *not* have a strong candidate pool, take a moment to reflect on whether you feel like the search should be relaunched. Is the candidate you are considering a genuinely strong candidate, or are you settling for a poor hire because it is the best of bad options?
- If you have completed the preliminary references, feel confident there was a fair and equitable process, and believe the finalist is a genuinely strong candidate, you are ready to move forward to the offer stage.

Making the Offer:

- The board is responsible for hiring the Executive Director and extending the offer.
- Inviting the candidate for a phone call is ideal. Make the offer with clear terms and enthusiasm. Offer to answer any immediate questions and plan to schedule a follow-up call if the candidate is not prepared to offer an immediate "yes." Be prepared to have a clear date in mind by which the candidate needs to respond.
- Make sure the candidate has the information they need to make a decision. Do they know what success will look like? Do they know the organizational opportunities and challenges? Do they have all of the information they need about benefits and compensation?

What If They Say No?

- If your top candidate declines the role, try not to be discouraged. It happens! Use this as an opportunity to learn and reposition. Why did they decline? Is this something that can be addressed for their candidacy? And if not, how will you address it in future candidacies?
- If your top candidate says no, consider if there are any other candidates in the pool that you would like to extend the offer to next. Often a "backup" candidate ends up being a terrific hire!
- If there are no other candidates for consideration, go back to posting the role and activating networks again. Be patient and trust the process, always keeping the best interests of the organization in mind.

Other Candidates

- Always, *all* candidates should be communicated with in a timely and conscientious manner. For candidates who were finalists, it is reasonable for them to expect a phone call and to hear the news directly and graciously.

9. **Onboarding**

An Executive Director's immediate and long-term success can be greatly impacted by their onboarding process. Strong onboarding enhances productivity, improves employee retention, supports a positive corporate culture, and increases employee engagement.

The board may want to create a new committee that will be charged with the onboarding process, much as the search committee is charged with overseeing the recruitment process.

The onboarding process should be planned to span months and years - not days or weeks.

In addition to this overview of the search process for nonprofit boards, JUNE will provide a free guide for conducting an equitable and thorough onboarding process. The Onboarding Guide will be published Summer 2024 and will also be found at www.junepartners.net.

JUNE Partners is a retained executive search firm that specializes in searches in higher education, academic medicine, and nonprofit organizations. In addition to a full retained executive search, JUNE offers a flat-fee consulting engagement to compliment this hiring tool.

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