



The Search Committee's Vital Role in Nonprofit Leadership Transitions

The selection of a new leader is an exciting and significant time for any nonprofit organization, whether it's an academic institution, an association, or an arts, cultural or philanthropic entity. Leadership transitions offer an opportunity to reflect on the organization's future direction, vision, priorities and culture.

Search committees play an important role in supporting this transition, representing the perspectives of key stakeholders and participating in the early phase of a search strategy that will yield candidates that reflect the priorities, capabilities and cultural alignment likely to produce sustainable results for the institution.

We at Spencer Stuart have more than 60 years of experience working with search committees and candidates, gathering their perspectives and experiences while observing firsthand best practices regarding search committee effectiveness and candidate care. We also fully understand that nonprofit organizations aspire for a fair and inclusive search process that yields a diverse pool of candidates, results in a long-term leadership solution that is respected internally and externally and that ensures a diverse and high-performing team.

A strong committee process is key to a search committee's success. While every leadership search should reflect the organization's culture, values and unique context, this guide provides general best practices for an effective search process. This document focuses on nonprofit leadership transitions, however much of the content also applies to boards of directors of for-profit companies looking for CEOs.

Committee formation and composition

Search committee composition varies widely from organization to organization, depending on culture and other factors. Some are committees of the board; others include representatives from a wide variety of stakeholder groups. Academic institutions often have policies establishing the specific representation of their search committees, while associations may include representatives from various sectors of their membership.

It is helpful to consider the following factors when forming a search committee.

Committee size

A nimble search committee is crucial. Some of the best search committees have no more than six members, while others may have 12 or more members in order to adequately reflect their constituencies. Whatever the exact number, the search committee should be small enough to allow members to participate in every step of the process, and large enough to ensure buy-in for its recommendations.

Diverse viewpoints

Individuals who have been involved in the organization for many years bring a historical perspective on past decisions. But rising leaders and other individuals who are newer to the institution can bring important perspectives to a committee.

Inclusion and equity

The committees themselves must represent the diversity of the institution they serve beyond mere organizational boundaries. Unconscious bias is also a core issue that must remain at the front of the committee's mind. Most organizations strongly encourage (and in some cases require) committee members to take unconscious bias training from either an internal group or a third party.

Institutional culture

Search committees should represent the stakeholders the organization serves. Academic medical centers, for example, might include faculty, hospital and student representatives on the committee for a dean search. Associations with chapter or affiliate groups may include someone from those communities on the committee. International NGOs may wish to include people who represent distinctly different cultural or regional backgrounds. Regardless of who they represent, all committee members should view their role on the committee as serving the interests of the institution and all stakeholders, rather than a specific constituency.

Timing

Advanced scheduling is critically important to an efficient process. Dates should be reserved for committee meetings and candidate interviews early on to ensure that all or most committee members will be available for interviews. Otherwise, weeks can be lost trying to schedule interviews after promising candidates are identified. Timing relates also to committee size: The larger the committee, the more difficult it becomes to schedule key meetings, ensure majority participation and reach consensus on candidate recommendations.

The search committee's mandate

For some organizations engaged in a search — including most academic medical centers (AMCs) and similar organizations — the committee serves in an advisory role, offering a slate of qualified people to the dean, board, provost or some other leader, who will select the finalist. For these committees, best practice in our experience is for the committee to present to the decision-making leader a slate of three to five highly qualified yet unranked candidates coupled with a summary of their individual strengths and potential concerns.

Other institutions — typically in arts, cultural or philanthropic organizations — form a selection committee that is involved from start to finish and makes the final hiring decision.

Regardless of the approach, the committee's mission should be clearly understood by all participants at the outset, and the search consultants should ensure the committee carries this out.

A committee should also decide at the outset how it will interact with constituencies such as staff, foundation members, donors or representatives of the student body, so that these groups feel engaged in the process and are comfortable with the result. Committees should also determine up front what level of information is shared, to ensure a confidential process.

Clear, agreed-upon position specification

A clearly defined position specification is central to attracting an appropriate field of candidates and successfully choosing the new leader. Through a series of structured interviews with committee members and a reasonable sampling of a cross-section of the organization's constituents, the search consultants will identify areas of agreement — and disagreement — in the expectations about the position and capabilities required for the role. The search consultants will draft the position specification, which will be edited and approved by the hiring manager.

The search committee should carefully review and be intimately familiar with the position specification — particularly the candidate profile section — as these will be the criteria upon which candidates will be assessed.

Throughout the search, committee members should hold one another accountable for remaining aligned with the position specification. A charismatic candidate may “connect” with some people more easily, even if that person is less qualified than other candidates; the committee can offset the power of charm by taking time to get to know each candidate and reflecting on how they compare to the desired capabilities, experience and cultural style for the role.



Oversight by a strong, engaged chair

One of the most important elements of a successful search — if not the most — is the search committee chair (or co-chairs). The ideal chair is an impartial leader committed to pursuing the best interests of the organization, and someone who can dedicate the time to the process. The most effective committee chairs do the following:

- » Run an open, transparent process
- » Regularly update the board or hiring executive on the status of the search
- » Act as a liaison between the search committee and search consultants and hiring managers
- » Ensure that a majority if not all committee members participate in discussions
- » Serve as the arbitrator of disagreements among members, when necessary
- » Help to facilitate the transition of the new leader

A voice, not a vote: The role of the outgoing leader

The retiring or outgoing leader can provide valuable counsel at many points in the search process but ideally maintains distance from the search and the committee. For example, the role of outgoing leader may include:

- » Sharing views on the role and its evolution
- » Meeting with the search consultants and/or the search committee at the beginning of the search to share their perspectives on the current state of the organization
- » Suggesting search firms for the committee to consider, without being involved in the selection
- » Being available to meet with finalist candidates, assuming the search committee agrees
- » Helping the organization stay calm and focused on its work as the search proceeds
- » Serving as a sounding board when appropriate but not seeking out information
- » Supporting the new leader in a smooth transition

Managing an effective interview process

The candidate interview is a two-way street. It's a crucial opportunity to get to know a candidate, learn more about the person's skills and assess cultural alignment. At the same time, it's equally important for showing candidates that this is both an institution and a role where they would excel. A poorly managed interview protocol negatively impacts both of these goals.

The following best practices are critical to drive an effective interview process.

Mastering the (virtual) recruitment process

Video interviews, adopted almost universally during the COVID-19 pandemic, are now the norm. They have proven extremely effective for first interviews and, in some cases, follow-up interviews. Virtual interviews are valuable in reducing the barriers for entry into a search process by minimizing breaches in confidentiality, opening opportunities to candidates from different geographies and in turn increasing the diversity of your pool. They also lower costs for hiring organizations and speed up the search process, as busy candidate schedules are easier to navigate with no travel involved.

To get video interviews right, avoid having your entire committee in a boardroom while the candidate is on video; instead, committee members should be on their own individual video screens. Holding three to four panel interviews each day across two consecutive days can ensure everyone remains fresh and engaged. Getting these video interviews right helps give a candidate a positive view of the organization and ensures a similar experience for both the committee and the candidates.

Focus your interviews on what matters most

As we've noted, a seamless interview process is important for getting the most out of a meeting. Your search consultants should provide a protocol for orchestrating organized, professional and consistent interviews that enable committee members to understand each candidate's critical capabilities and give them a feel for the organization. The steps taken now will be valuable when the committee reconvenes to compare and contrast their impressions, insights and feedback related to the interviews.

A standardized interview guide, with predetermined questions tailored to the position being filled, helps mitigate potential unconscious bias and ensure that everyone is fairly and consistently assessed. Some committees also use a scoring sheet to rate each candidate against the position's requirements.

Candidates should be asked to demonstrate their abilities based on specific experiences they have had — not on hypotheticals. Their responses will reveal their leadership styles, their approaches to working in teams, their sensitivity to internal politics and their openness to others' opinions. It may be helpful to assign one or two individuals on the committee to ask follow-up questions based on the candidate's presentation and to field questions from the candidate.

The search consultants will have already provided materials to read about each candidate. The pre-reading ensures an informed discussion, and that the committee is getting the most out of limited time with candidates. The committee chair should oversee putting the conversation back on course if it starts to wander.

Lastly, build in ample time for the candidate to ask questions. They are evaluating your institution as much as you are evaluating their individual candidacy.

Don't forgo a further evaluation

It is not uncommon for committee members to feel strongly in favor of one particular candidate at this point, and even feel tempted to make a final recommendation. However, a second round of interviews with multiple candidates — whether that's done by the search committee or handed off to the hiring managers — is essential for getting to know the candidates better, including their ideas for and questions



about the organization, and addressing lingering concerns or questions about the candidate's suitability, alignment, interest or ability to relocate.

In a well-run process, the search committee will select three to five front-runners for a second round of interviews, which are usually done in person. In many cases, these subsequent rounds of interviews would be done by the hiring managers, but sometimes the search committee may conduct one or two more sets of interviews before presenting a few top selections to the hiring manager.

Debrief after the interviews

While the first round is for identifying a set of top candidates for the open position, subsequent rounds will narrow the field to a small group of finalists. The search consultants, with help from the chair, will capture committee members' feedback as quickly and comprehensively as possible regarding candidates' suitability for the role and their alignment with organizational culture. The overall goal is for top-line feedback about what they liked, what they are less sure about, and what areas the search consultants can address through further referencing.

Maintain confidentiality

Open dialogue is central to a successful search committee. Yet public leaks from those discussions can severely damage a search, potentially putting a candidate's current job at risk and harming the organization itself when candidates are prematurely exposed. Quite simply, the information shared and discussed about individual candidates must be contained within the committee, with the committee agreeing on how to share status updates with key stakeholders without breaching confidentiality.

Confidentiality applies to the entire process — including interview timing, the search's status and the offer — and should be observed in perpetuity. The protocol for sharing information created at the beginning of the process must be followed throughout. And even after the search is complete, only the search committee and hiring managers should know which other candidates were considered and why they were eliminated from consideration.

Committee members should also resist the temptation to use their networks for their own reference checks; even casual conversations about potential candidates outside of the committee can harm both the candidates and the reputation of the institution. The search consultants typically drive the referencing process, although some hiring managers often prefer to do some referencing themselves. Either way, these reference checks should be done discreetly and at an appropriate time. There should be no contact with people at a candidate's current or former organization without the candidate's agreement.

Ensure an even playing field for internal candidates

The search committee should display no bias either for or against an internal candidate. Our experience suggests that a very strong internal candidate who meets the position specification is often favored over an external candidate who is not measurably better. Conversely, we strongly recommend against bringing in internal candidates for "courtesy interviews" when there is no intention to offer them the role, as they will likely experience even bigger disappointment from feeling like they were not taken seriously.

Avoiding search pitfalls

An ineffective search committee and process can cause delays, deter potential candidates and fail to recruit the individual best suited for the organization. A search committee's failure to align at the very beginning on what the institution's mission is in filling this position and what they seek in a hire will hamper and delay the overall process.

With that in mind, here are some of the most common pitfalls.

Unrealistic expectations about the candidate pool

Unrealistic expectations about the experience level, professional background or lived experience of potential candidates can set the committee up for difficulties if those individuals do not materialize. Of course, committee members may believe their institution is the best, but plenty of other factors make a job more or less attractive to candidates: location, compensation level and the role's scope are just a few. The search consultants will help the committee understand the likely pool of candidates and the prevailing compensation trends, helping to inform a search strategy that attracts the best, most qualified, most appropriate pool of candidates.

Delays in the search process

If a search drags on too long, promising candidates may decide to pursue other opportunities or could view the organization as indecisive or disorganized. Commit to making the search a priority and stick as closely as possible to the agreed-upon search calendar to ensure that the process proceeds in a timely manner.

Ill-defined position specifications

The search committee and decision-makers must be fully aligned on the specifications for the job being filled before entering the talent market. As noted above, the search committee needs to make itself intimately familiar with the position specification; failing to do this may needlessly delay progress, as shifting requirements mean that more and more candidates have to be brought in to match them. It is crucial to take the extra time at the beginning of the search to ensure that the committee understands the position description and how it reflects the organization's mission and the role's requirements. And throughout, it is important that the committee holds itself accountable for sticking to these criteria for evaluating candidates.

Competing perspectives

Members of the search committee will inevitably have multiple, sometimes competing, agendas; it's also often the first time this group has worked together. It may take time for the committee to get into sync. Creating alignment and rapport at the beginning of the process is key. The search committee chair must also encourage thorough, thoughtful discussions that allow for divergent perspectives while maintaining a focus on the ultimate goal: filling the position with the most qualified leader.





Serving on a search committee is both a responsibility and a privilege. Most committee members see their service as important to both the institution and their own professional development. With the support of an engaged search committee chair and the assistance of your search consultants, the best committees evolve from a group of highly invested, diverse stakeholders to a high-functioning transition team whose service can often play a helpful role in the new leader's onboarding and orientation process. Often, new relationships are developed and old ones strengthened, and committee members themselves gain new insight into the institution they serve as well as the talent marketplace. Importantly, committee members leave knowing that they played a major role in selecting a leader for their organization's future.





BROOKS/SHUTTERSTOCK.COM/GETTY IMAGES/2023

About Spencer Stuart

At Spencer Stuart, we know that leadership has never mattered more. We are trusted by organizations around the world to help them make the senior-level leadership decisions that have a lasting impact on their enterprises, on their stakeholders and the world around them. Through our executive search, board and leadership advisory services, we help build and enhance high-performing teams for select clients ranging from major multinationals to emerging companies to nonprofit institutions.

Privately held since 1956, we focus on delivering knowledge, insight and results through the collaborative efforts of a team of experts — now spanning more than 70 offices, over 30 countries and more than 50 practice specialties. Boards and leaders consistently turn to Spencer Stuart to help address their evolving leadership needs in areas such as senior-level executive search, board recruitment, board effectiveness, succession planning, in-depth senior management assessment, employee engagement and many other facets of culture and organizational effectiveness, particularly in the context of the changing stakeholder expectations of business today. For more information on Spencer Stuart, please visit www.spencerstuart.com.



© 2024 Spencer Stuart. All rights reserved.
For information about copying, distributing and displaying this work, contact: permissions@spencerstuart.com.

