Finding the Right ED: Creating and Managing an Effective Search Committee

For many nonprofits, recruiting an executive director (ED) is a challenging experience. And creating a search committee to oversee the recruitment process can seem like a daunting task. What role should the committee play and what makes a good search committee member? How do you go about selecting a search chair and what exactly does a search chair do? Where do recruiting firms fit into the picture?

We have found that having an organized, effective search committee is a key factor in the successful recruitment of an ED. This article will explain both how to create a search committee and how to equip it with the tools necessary to find the right ED for your organization.

Forming a search committee

Selecting the search chair

How you create and structure a search committee can depend on many factors, including the size and structure of your board, the availability of board members to work on the search committee, and the urgency of recruiting a new ED. But the process typically begins with the selection of the search committee chair. This is a very important decision—to be made by the board chair, working with the rest of the board—because a strong search chair is essential to a disciplined, effective, and professional search process.

The ideal search chair will be a strong leader, a consensus builder, an effective communicator, and a person who has the time and dedication to see the search through to completion. Leadership skills are crucial. The search chair will need to keep the committee focused throughout the search process, and to build consensus among committee members. It is also important for the search chair to lead the group to make decisions in situations when full consensus isn't possible.

The search chair should be an exceptional communicator, as s/he will keep all the stakeholders of the search informed on the committee's progress. The search chair must stay in close communication with the board chair throughout the process, providing consistent updates about the search process. Having a well-informed board chair will help to prevent any surprises at the end of the search when critical decisions are being made.

Beyond these skills, it will be important that your search chair is willing to invest significant time in the process, and fully understands the scope of responsibilities. While it varies, a search committee chair will typically need to spend several hours per week or more on the search until it is completed, which in our experience takes three to six months. It's important to talk with a potential search chair regarding this time commitment and the specific responsibilities before making the selection.

It is extremely important to be explicit about the full range of the search chair's responsibilities, including managing other committee members. Even dedicated and talented search chairs can run into difficulties if their responsibilities have not been clearly defined. For example, a committee member involved in one ED search was consistently unprepared, which made the full committee much less productive. Ideally, the search chair would have taken this person aside to discuss how she was hindering the committee's progress and then worked with her to come to an agreement on her role going forward. But the leadership responsibilities of the search chair were never clearly defined, and that conversation never happened.

The search chair has a wide range of responsibilities, including:

- Keeping the board chair informed throughout the whole process. We offer a caution about giving updates to staff: you'll probably want to make sure that all updates come from the board chair and that only appropriate search information is shared with staff, i.e. no candidate names, resumes, references, etc.
- Selecting the search committee members and communicating the requirements of this role.
- Establishing the structure for and leading search committee meetings.
- Identifying a point person to manage all logistics and administrative work.
- Scoping the job, drafting and finalizing the job description with committee member input.
- Obtaining the board chair's approval of the job description before going to market.
- Establishing a system for developing, interviewing, and selecting candidates and leading the search committee through this process.
- Facilitating the selection of the short-list candidates.
- Ensuring reference consent forms are obtained from candidates and that professional references and background checks are completed on the finalists.
- Presenting finalists to the executive committee/larger board and explaining the process of how the search committee came to select the finalists.
- Collecting executive committee/larger board feedback from their meetings with the finalists.
- Determining the terms of the offer and deciding which individual will present and negotiate the offer with the selected candidate.
- Contacting the unsuccessful candidates by phone to thank them for participating in the search.
- Preparing the board chair for developing a transition plan for the newly recruited ED.

Building the search committee

The search chair’s first task is to form a search committee, ideally of five to eight people. Establishing co-chairs will help the search chair manage the tasks of executing the search and will provide backup. Though the search chair leads the committee, co-chairs should have the ability and authority to lead in his/her absence. They also often play an important role in interviewing finalist candidates, answering their questions, and handling closing negotiations.

Having a well-balanced search committee consisting of representatives from the board’s executive committee, and any other important constituent group is necessary and will give the search committee a tremendous amount of credibility. Remember to have key decision makers on the search committee (e.g., the incoming board chair). It’s also helpful to have at least one board member who has deep relationships with the staff of the nonprofit organization, especially the team that will report to the ED. Having a keen understanding of direct report staff will help to identify the cultural and management requirements for your ED role.

Like the search committee chair, search committee members must be willing to invest significant time in the process every week throughout the entire search. Members who helicopter in and out will not be as informed or credible during decision making time. Members must be absolutely committed to protecting candidate confidentiality. The search chair must explain and potentially reiterate that committee members may not discuss candidates with anyone beyond the search committee. While it may seem innocent to informally chat with a contact about one of the candidates being considered, if word gets back to the candidate's current employer, it could put the candidate's existing job in jeopardy. This kind of breach could damage the organization's reputation and even subject it to potential litigation.

Having sub-committees or "advisory groups" within the search committee can complicate the process and lead to internal strife. The committee will need to be a united front throughout the search. To ensure an inclusive process, all search committee members should have equal voting privileges. Each search committee member should be able to give input from the start, from deciding on which search firm to use, to narrowing down the candidate short list.

There are two key things to avoid when forming your search committee. First, resist having internal staff members on the search committee. It's awkward and inappropriate for staff to be interviewing their potential boss. Second, avoid having the incumbent on the search committee at all costs. It can be difficult for an incumbent ED to be objective about the requirements for the incoming ED and to evaluate candidates. Likewise, it can be difficult for search committee members to be candid regarding requirements for the incoming ED, especially if there are requirements that the incumbent ED did not meet. The incumbent can be included in the scoping process and at the very end when the finalist has been presented to the executive committee.

Engaging a search firm

Some nonprofits choose to work with a search firm to help execute the recruitment process. Engaging a search firm can provide valuable guidance and dramatically reduce the time commitment needed from search committee members. From facilitating initial scoping conversations, to identifying and developing candidates, to guiding the committee and board through the interviewing, referencing, and offering phases, a strong recruiter will ensure that your committee engages in a rigorous and efficient search process. A recruiter can also provide third-party objectivity, flagging issues as they arise. This can be particularly helpful in cases where the search committee is divided on the profile of a position or on a set of final candidates. Third-party objectively is also useful when conducting references on potential candidates.

If you plan to hire a search firm, the search chair should make the selection with input from the search committee. Some tips to consider that will facilitate this process include:

- Create the draft outline of the ideal position description and candidate profile; this will help you as you describe your needs to prospective firms.
- Build the short-list of potential search firms. Often, a good first step in the process is to talk with colleagues and associates to identify the firms/recruiters they have worked with in the past.
- Interview and check references for the search firm and the recruiter who be leading your engagement.
- Request proposals from and interview the short-listed firms.

For each firm you interview be sure you understand how the firm builds its candidate pool. You want to be sure that the firm/recruiter is tapped into networks that will lead to a successful outcome. You'll also want to understand the background of each of the recruiters who will be working on your search. Often there is a lead with whom you'll have most of your interaction, but there may also be support staff who are tasked with research and screening candidates.

Once selected, a good recruiter will maintain a close relationship with the search chair. To get the most out of their partnership, the search chair should:

- Establish a schedule for bi-monthly phone/email updates with the recruiter and bi-monthly search committee meetings.
- Delineate clear roles for search committee members and the overall search process.
- Maintain day-to-day communication with the search firm.
- Prepare with the search firm prior to search committee meetings.
- Review search firm presentations/materials before anything is shared with the rest of the search committee.
- Clarify the interview process and format with the search firm.
- Determine with the search firm how to format second- and third-round interviews and who will have access to confidential references.
- Seek council and support from the recruiter regarding each step of the process.

Managing the search process

Scoping the role

Once your search committee is in place, it's time to complete your position description. While the search committee will work together on this initially, it is important to maintain a consultative process that allows internal staff and external constituents to feel valued and "heard" during the scoping. This will allow them to share their thoughts about key challenges within the organization, and it will give you a broader perspective and understanding of the organizational culture and the requirements for the incoming ED. Explore with the board chair, other search committee members, and your organization's most senior executives who to include in the scoping process. You may want to lead group scoping discussions with direct reports to the ED. More junior staff could also be included, carefully selecting one or two who broadly represent the organization in terms of cultural fit and performance. Key funders may want to have a voice in the scoping process as well. Sometimes, other outside consultants (i.e. organizational development consultants or executive coaches) who know the organization well will also participate in scoping.

Developing the applicant pool

In addition to strategically posting the ED position specification on job boards, the search committee should brainstorm a list of potential candidates and sources. Committee members should think broadly about who may be able to lead them to qualified candidates, seeking out referrals from other board members, internal staff, external constituents, and individuals in their personal networks.

One nonprofit that works to increase college access for urban high school students conducted a brainstorm meeting for its ED search. Each member of the seven-person search committee generated a list of between 15 and 20 people to contact. Several search committee members even had as many as three candidate names on their initial lists. All of the members made a commitment to email and follow up with their list of contacts. The result: two of the six people interviewed for the ED position surfaced as a result of the search committee members connecting with their own networks.

Screening applicants

As potential candidates surface, the search committee will need to establish criteria for screening and advancing candidates in the search process. One effective approach is to have a subset of the search committee review applicant resumes and only present resumes of qualified (on paper) applicants to the search committee. To facilitate this phase of screening, a discussion establishing the “must have” and “nice to have” criteria for candidates should take place.

We have found it helpful for the search committee to identify no more than five “must have” criteria by which they assess applicant resumes. The applicants whose resumes show they are most closely aligned with the criteria are then reviewed by the full search committee. Have the search committee review resumes and identify questions that will be addressed during an initial telephone screening.

One search committee member should conduct telephone screens and report back to the entire committee. This provides an opportunity to ask questions that surfaced during the resume screening, to present the opportunity to the potential candidate, and to establish mutual interest in advancing to the interview phase.

Conducting interviews and reference checks

In most cases, the search committee will interview a long list (five to eight) of potential candidates during first-round interviews, and once the list has been narrowed down, the committee may choose to have a second round of interviews with the top two to three candidates.

Once the first- and second-round interviews take place, the search committee will need to decide on the candidates who will advance to interviews with board members beyond the search committee. Two to three candidates should be advanced. The committee should avoid ranking the candidates; this could influence the larger board before the candidates are interviewed.

We have found it helpful to start the reference and background check process at this point or earlier in the search. While some of the references may be done in tandem with round three interviews, starting the referencing process here will help the search committee clarify any questions they may have about the candidate. Furthermore, if there are serious issues that surface regarding a candidate, it’s far better to identify those issues sooner rather than later.

Consider the reference process even during early conversations with sources. If a source recommends a candidate, ask the source about the candidate’s track record, why s/he has been successful and where the candidate may not be a perfect fit. Documenting these early conversations can add color to later conversations with the candidate. References can also help a search committee understand how they'll need to support a candidate if hired. Sometimes a concern that comes up isn't a deal breaker. By talking with references and addressing the concern, you can explore with references how the candidate's weaknesses have been compensated for in the past.

It's critical to obtain written consent from candidates allowing their references (the ones they give you as well as ones you identify) to be checked. We advise asking the candidate to sign a reference consent form granting this permission.

For round three interviews, the executive committee or larger board will step in to interview the final two to three candidates.

Some organizations add another dimension to the recruiting process, although we view this as optional. After the executive committee or board interviews the top two to three candidates, the list should be narrowed down again. The top one or two finalists will then have "campus meetings", which are informational sessions with key staff and/or constituents. Please keep in mind that these are not interviews. Intensive interviewing will have already taken place. The time should be spent having the candidate give an overview of his/her background and then having the staff talk about their roles within the organization and answering candidate questions. Remember to inform those attending the campus meetings that these are NOT interviews, but that these meetings serve multiple purposes:

1. It's an opportunity for the organization to really "sell" itself to the candidate.
2. It allows the candidate to get a feel for the culture of the organization and ask more questions.
3. It gives staff and external constituents an opportunity to participate in the process, and if agreed upon by the search committee, an opportunity to give their feedback.

In most cases, after the campus meetings are complete, the final decision is made by the executive committee by a majority vote. The final round usually consists of the top finalist participating in a social gathering or "get to know you meeting" with the larger board of trustees (again this is not an interview, but an opportunity for the board to give their final stamp of approval).

Developing, extending, and negotiating the offer

The search chair and search committee may work together to devise the compensation package to present to the selected finalist. Because cash compensation is usually limited for EDs relative to the qualifications that EDs bring to their jobs, remember to be open, creative, and flexible in your approach to designing the compensation package. Non-monetary components such as start date, vacation time, sponsored educational programs, and flexible work arrangements may be attractive to candidates.

The search chair and search committee will also determine who will present and negotiate the offer. In some instances this may be the board chair or the search chair. The decision should be based on the relationship that has been formed between the candidate and the members of your organization, coupled with the negotiating ability of the persons being considered for this task. Be sure you choose someone who can convey the offer with enthusiasm and who has established a relationship with the candidate during the search process. This will provide a smooth foundation for negotiations.

Concluding thoughts

The most important thing to keep in mind is that the search committee must present a united front on the short list to present to the executive committee or board of directors. The search committee members must all agree (no matter what) that they fully support whoever is chosen by the larger committee. This will allow for a more productive and positive transition process for the ED.

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