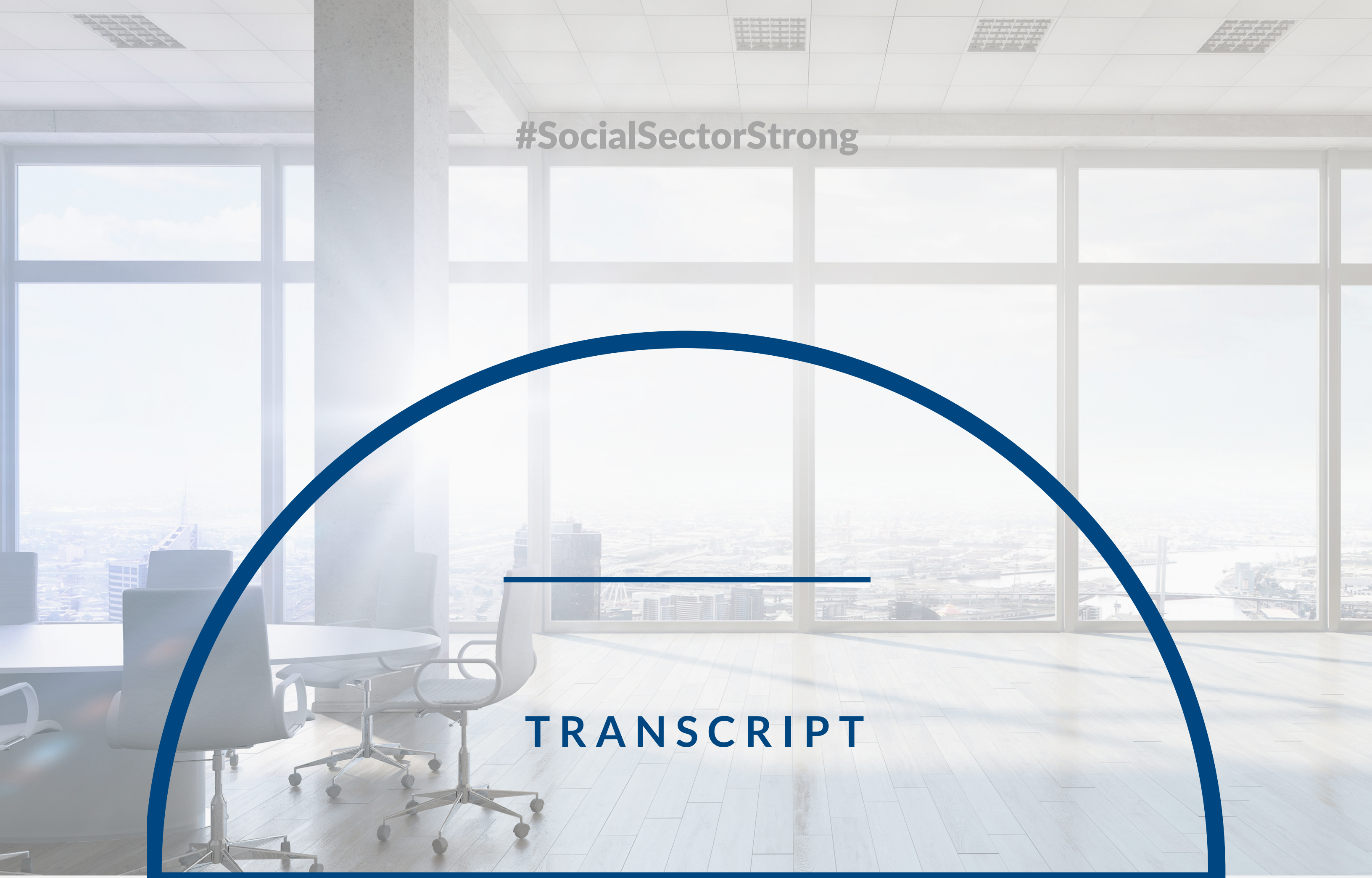

#SocialSectorStrong

TRANSCRIPT

FOLLOW THE NEW LEADER

IMPACT SEARCH ADVISORS
by Nonprofit HR

FOLLOW THE NEW LEADER

Your visionary and well-respected CEO is retiring, an announcement that has divided staff! While some on your leadership team are ready for fresh perspectives a new leader will bring, others are voicing concerns that change will further impact the organization's ability to succeed in an already unstable economy. Join in on this conversation and hear how to plan for and conduct an executive search in the midst of cultural breakdowns.

Gain clarity on how a well-planned executive search should:
-Help reset an organization's culture in preparation of a new leader
-Help identify and communicate key challenges as high-priority leadership needs
-Translate major concerns into discussion points with executive candidates
-Create a communication strategy that manages the expectations of the executive search timeline, process and core issues new leader will immediately address

SPEAKERS:

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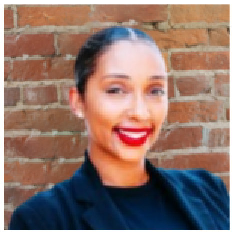

Jami Armstrong
Search Consultant
Impact Search Advisors

MODERATOR:

Alicia Schoshinski
Managing Director,
Talent & Development

Alicia Schoshinski: Hello everyone and welcome. Thank you for joining us for Nonprofit HR's Virtual Learning Educational Event. Today's event is entitled Follow the New Leader. My name is Alicia Schoshinski and I'm the Managing Director of Talent and Development at Nonprofit HR. I'm going to be your moderator for today. We have a lot of great content to cover, so let's jump right in.

Before we get started, I'd like to go over a few items so you know how to best participate in today's event. You've joined the presentation listening, using your computer speaker's system by default. If you would prefer to join over telephone, just select telephone in the audio pane, and the dial-in information will be displayed. You'll have the opportunity to submit text questions to today's presenters by typing questions into the questions pane of the control panel. You may send your questions in at any time during the presentation. We will collect them and address them as we're able throughout the presentation, but definitely in the Q&A session at the end.

Today's session is being recorded and you will receive a follow-up email within the next few days with a link to view the recording, as well as receive the HR recertification credits.

Today's session is hosted by Myra Briggs. Myra is the Managing Director of Impact Search Advisors by Nonprofit HR. Myra brings over 18 years of experience in executive and professional search and leadership development. She's responsible for the strategy and guidance to the firm's Search practice, including building and leading a team of executive and professional level search and research consultants responsible for engaging in client-facing work nationally. Myra will share more about the work her team is doing for Impact Search Advisors. She's going to be joined by Search Consultants Danisha Martin and Jami Armstrong, both with extensive search experience. So without further ado, I'll hand it over to Myra.

Myra Briggs: Thanks, Alicia. It's so exciting to be here with you all today as we spend some time doing a deep dive into executive search for the nonprofit sector.

We're going to be talking about quite a bit of information and taking your questions. Most importantly, we're going to be helping you navigate the task of attracting your next new leader. And so, we're going to get right into the presentation, and I'm going to introduce you to our presenters for the day.

I'm joined by my colleagues, Danisha Martin as well as Jami Armstrong. Danisha has been with the firm for going on three years now, and Jami is the newest addition to the Search team. We are very excited to chat with you today as we're discussing following the new leader. Ladies, do you want to say a quick hello?

Danisha Martin: Thanks, Myra. It's great to be here and I'm looking forward to getting into some of the nitty gritty as we say and a really interactive conversation.

Jami Armstrong: Thank you all for joining us. I'm looking forward to talking.

Myra Briggs: Thanks, ladies.

All right. We thought it would be fun to present two different potential transition scenarios to you all today as sort of the backwards version of pick your own ending, the little stories that we've read when we were children. So, I'm going to read through scenario A and scenario B for you and if neither of the scenarios really resonates with you, just pick one of them so that you can follow the task within context. Imagine yourself being a member of a board of directors who has just receive a resignation notice from your CEO or executive director.

So, scenario A is one that we come across quite frequently where a nonprofit CEO has announced their retirement after a 12-year tenure. The CEO has given the board 12 months' notice, which is nice if we can get that, and the organization has a team of three solid human resources professionals. The departing CEO was also promoted from within the organization, so this organization has never conducted an executive search before, with or without a partner. And unfortunately, while it is a high performing team, there is no one internally that has either been earmarked or raised their hand for succession planning into the number-one seat. And finally, it's important to note that the departing CEO is beloved by the staff, as well as the community, and will leave with powerful legacy. So, some of the things that we want to point out here that are going to be important to making some decisions for this organization are:

The fact that the CEO has given 12 months' notice, so you've already got your timeframe as to when someone new has to be in place.

The organization does have a human resources team of three people. So, there's an evaluation that will need to take place as to whether or not your internal team can serve as a search partner for you, or if you need to employ a partner like Impact Search Advisors in assisting with this very important recruitment campaign.

There are no internal candidates, so this is not going to be an easy breezy promote-someone-from-within situation.

There's a strong legacy that is being left behind by the previous CEO, so that means this is going to be a high-profile search. Meaning that there are a lot of people that are invested in it going right, even outside the walls of the organization.

So, take a look at that one, see if that one resonates with you and follow that track. If not, let's go on to scenario B, Alicia.

The scenario B is a bit different. This is an executive director that's been with the organization for just two years. The terms of the employment agreement do require a 60-day notice, which is much less than scenario A, but is a bit closer probably to some of the notice periods that many of you all have been given, if not shorter. The organization does not have internal human resources and you use an external vendor like Nonprofit HR. The current executive director was hired by a search firm, so the board does have some experience working with search partners like Impact Search Advisors in the past. And the deputy director is strong enough that they are stepping into that interim role, that's something to consider as well. Finally, the organization was in a bit of a crisis when the last executive director left, so the board made a decision to hire a transition executive director, someone that could come in and turn the organization around from a financial and operation perspective. And this person was successful in doing those things, however, didn't do much to improve culture. As a matter of fact, in the not-doing-much-to-improve-culture, as you can imagine, without paying close attention to culture in the midst of fixing finance and operations, there may have been some hits to the culture of the organization.

Some key points to remember here is that there's a short notice period for this executive director, there's no human resources support on board and you do also have an interim executive director to consider who will likely all apply.

All right, so we'll pause there for a moment, let you pick which path you're going to take, and then we'll get ready to get moving.

Now that we know that an executive departure is taking place, there's some prework that has to be done before you can even decide who your search partner is going to be. Whether it's going to be an internal search partner, an external search partner or if the board itself is going to try and do it without the partnership of an expert.

The first thing you want to do is identify your decision makers, whatever you call them is up to you, but some common names are transition committee; search committee; sometimes it just ends up being the executive committee of the board of directors; or a mixture of leadership with internal to the organization, as well as some external stakeholders. Whatever that mixture ends up being, you want to make sure that it is diverse, that you identify them early on and get commitments from them for the duration of the process. We'll talk a little bit more about timeline later on. But when we're thinking about this, you really are asking people for a year-long commitment; whether it takes to search a year because of hiccups that may happen along the way, or if there's post-transition support, coaching and onboarding that will take place for your new leader. It is only prudent to expect that six months to a year of your transition committee's time will be spent on this effort, so keep those things in mind. Also keep in mind that some of the decisions that you make in your partner can also significantly decrease or increase the timing that it takes to run a full search.

You also want to be very careful to develop an effective communication strategy, which Jami will talk quite a bit more about later on. But some of the things that you want to remember is that if you don't tell the story yourself, those that are interested will make the story up on their own. And that is the very last thing that you want to happen in either of the scenarios that we presented, whether it's the long and successful tenured CEO, you want to make sure that that story is correct in keeping their legacy intact, or if it's the CEO that came in for two years and whipped the operations into shape, you want to make sure that you're also communicating that to the team; that this was not a loss, that this person came in to do what they were supposed to do, was successful and now it's time for the next phase of growth for the organization.

You also want to be careful to have strategic exit interviews with your outgoing leader, whether it's a happy departure or not-so-happy departure, whatever information they give you is valuable and useful, and you want to take care to receive it, and not just in one sitting. You want to set up different meetings to talk about culture, to talk about the finances, to talk about the operation, to talk about key initiatives. To make sure that there is a smooth transition from that exiting leader into either an interim or into a new leader if you have the full year, or even a little bit less time to make a smooth transition and help them overlap.

This is also a great time to review the culture of your organization through a cultural assessment or by surveying your staff. No board of directors can ever be intricately involved in the day-to-day workings of the staff. If you are, then something is seriously wrong because it's not your job to be there every day. What is your job, though, is to be a governing body that sits high and low, and employs the right type of partners and resources in order for you to stay close to the day-to-day operations of your organization in order to ensure mission sustainability. A cultural assessment with using an external partner, like Nonprofit HR, would be very helpful in coming in and surveying your team to determine whether or not there are issues that you need to be looking to resolve with your next leader. Or, if there are things that you absolutely must keep the same in order to keep the culture that has been so instrumental in driving the mission forward, you won't know unless you ask, but you want to be very careful to do that. And, if your internal team is unable to do so, employing the expertise of an external partner can be very helpful in realizing those goals.

A strategy and leadership review is almost a no-brainer when it comes time to replace a CEO because we really just want to find out, what in the world is the new CEO going to do? Are we really looking for a 2.0 version of the last CEO or are we taking this opportunity to re-assess the needs of the organization moving forward? And, therefore, creating a profile that will actually take us into the future for sustainability.

It's a great time to look at some of those strategic goals. Even if the departure happens in the midst of a strategic plan that has already been set, use it as an excuse to review some of those things. Do a temperature check. See whether or not things are going along the way that they should be. A new leader coming in is a fantastic opportunity for you to seize the opportunity to switch directions on any initiatives that may need a bit of a boost or that have derailed a bit.

And then finally, you want to make a decision as to who your search partner is going to be. Whether you decide to opt for an RFP process to select an external search partner, or if your internal team has the bandwidth to manage the full scope of an executive search on their own, you need to make that decision and you need to be prepared to stick with it. What that means is really digging into and being honest about what comes out during the prework session to ensure that you have all of the necessary resources in order for you to run and ultimately hire a new executive.

All right, so before Jami jumps into communicating and identifying what some of those key needs are going to be, I really want to encourage you to open your mind, encourage you to think outside of the box, encourage you to split up some lists; your must-haves and your nice-to-haves do not have to be in the same space. However, it's very important for you to get them out, get them on paper, get them up on the whiteboard, put them out in the universe, so that everyone on the transition committee can talk about them because it's only in that communication that you will really uncover what the needs are of the organization moving into the future. And, how will we be able to potentially, and in a positive way, change or even bolster the trajectory of the organization with this new hire.

So, some of the ways that you can do that are by adopting an outside-in approach. Taking the perspective of an outsider and seeing how the organization is perceived from the outside. This practice can really help us begin to see some of those bottlenecks and landmines that we would not otherwise see because we're so embedded in the work, so embedded in the day-to-day, so embedded in what those key initiatives are or the diversification of revenue streams so that we can move programs forward. But, it really does take using an external approach as a part of the prework process to make sure that number one, we're being perceived in the marketplace in the way that we anticipate and that we think. Then, more importantly, to make sure that we're not missing anything and missing any opportunities for growth that we might otherwise if we were to be taking a different perspective.

Whenever I was in college, I used to tell people that I'm a why-not kind of girl. When anybody asked why we were doing something, my answer was, “Why not?” Because I believe in the possibilities and the possibilities lie outside of the walls and the realms of our reality. Sometimes we have to ask, why haven't we taken on this initiative? Why haven't we looked for a leader that's never been a CEO before? Why haven't we look for a leader that comes from a different demographic? Why have we, as association leaders, only hired subject matter experts as the CEO and not gone the route of hiring an association executive? Asking why not is really opening yourself up to the possibilities, and I would encourage you to do that as you are doing the prework for your search.

Seeking synergies would be the last piece that I'd encourage you to do during your prework. In seeking those synergies, you're looking for like-minded individuals. That does not mean that we are forfeiting diversity of thought because it is absolutely essential to have different points of view around the table so that we're able to come to a cohesive conclusion. But it is also important to seek those who have synergies around what we hope to achieve by embarking upon this recruitment campaign. Synergies around those who have the same leadership philosophy that we know are going to end up being essential for the new leader. Synergies around what's at the heart and the core of this recruitment campaign, and seeing to it that we're able to move forward in a collective way.

I'm going to pause there, I've laid the groundwork. If we're talking about the pieces of the process, as we mentioned before, all of this work takes place before you even put pen to paper for a position description. All of this work takes place before you've decided who you're going to have run your search. This is the prework, and every executive search, is only as good and as successful as the work that precedes it. So that's where we're going to stop and take it right into identifying what some of those needs are. Jami Armstrong will be the one to lead us through this portion of the presentation.

Jami Armstrong: Thank you so much for that lead in, Myra.

Oftentimes, when organizations are going without a partner in these searches, they're going to skip critical pieces in the process. And we're hoping to enlighten you all today on how to not end up with a pool of candidates that do not reflect what you're seeking in the search. Whether your team is going to use a service like Impact Search Advisors by Nonprofit HR or go it alone, these are some of the steps that you're going to want to take in the comprehensive discovery process. So, let's start with the history of the role.

This is where you're going to want to think at length about, how did we get here and where do we want to go from here. I think this is also good space to adopt the why-not approach, so that you can really explore the possibilities.

Also, I want to identify the strategic goals and focus on clearly understanding the overall strategic goals, specifically as it relates to bringing in new leadership. So, examples of that are going to be, do we want our membership to increase? Is there a financial restructuring that needs to take place? Are we looking to diversify revenue through program expansion? And that's when you're going to begin the exercise of what competencies and ideal characteristics the person's going to have, that will enable you to carry out the strategic goals.

Next, we'll consider some key initiatives that are on your wish list, your nice-to-haves in the search. Some examples of that might be: Is there a new CRM needs to go in place on horizon? Are you considering a performance management overhaul? Another key initiative may be fundraising efforts.

So, we'll move on to metrics for success, and now that we have the goal set, you want to understand, what metrics are you going to use to gauge the success of this role? Examples of this could be: Are you looking for a membership increase? Increased revenue from certain program? Has turnover gone down? This is where you're going to really touch on your quantitative areas as it relates to the metrics.

Then, finally, you want to think through how this person's performance is going to be evaluated. And this is usually a tool used to reward performance, as well as something that we use as a tool for professional development. One thing that we're seeing as a trend is organizations have really moved away from the one-time annual review to a more frequent feedback model. So, you want to be sure to think through what approach is going to make the most sense to evaluate the performance of this new leader.

All right, so one thing that's going to be critical in this is you want a compelling job announcement. The days of the traditional bulleted job announcement just really leave a lot to be desired when we're looking at top talent. You're going to want to have a strong announcement, something that is going to really capture the talent that you want to attract. You also want to recognize that the announcement is going to be a great place to re-iterate the values of the organization. It is also an opportunity to re-establish the brand and very much a good way to talk about your initiatives around diversity and inclusion.

Additionally, we're in the age of social media, so you're going to want to exhaust all avenues of social media outreach. Some of the obvious ones are going to include LinkedIn, Twitter, and then, of course, any active social media accounts that your organization has that’s going to attract talent in the space that you've already generated a following.

You're also going to want to leverage your referral network. Oftentimes in the hiring process, this is the lower-hanging fruit. Remember, referrals can literally come from anywhere. Some examples of that would be referrals from your board, your members, as well as maybe your listserv. In short, you just really don't want to be shy about letting people know that you're in search for an executive leader. You also want to be diligent about engaging your board members and set the tone that you have an expectation for them to assist in leveraging their networks. I mean, they know the players for sure. Another area is going to be your organizational community outreach, and this is going to include your funders, corporate advisory board, as well as other stakeholders.

Then finally, just to touch on diverse job boards, we have had a lot of proven success utilizing diverse job boards. There are a number of job boards that are specifically designed to target diverse candidates, and we have found that it has been an extremely reliable resource for identifying diversity in the hiring process. It's also been a really proven tool for us in support of diversity, equity and inclusion objectives within organizations.

Now that we hopefully have a really solid understanding of identifying and communicating the key challenges, I'm going to introduce Danisha and she'll take you through translating all of these needs to connecting with perspective candidates.

Myra Briggs: Thanks, Jami.

I'm going to give Alicia an opportunity to let us know if there are any questions in the chat before we move on to Danisha, just to honor our initial commitment to take questions throughout.

Alicia, are there any questions?

Alicia Schoshinski: Yes, thanks, Myra. There is one that's related to what you were just speaking about with sourcing and ways to identify candidates. Somebody asked: What are some of the best practices for candidate sourcing within this COVID-19 environment that we are in?

Myra Briggs: Great question. I'll answer and then I will also pause and give Danisha and Jami an opportunity to add insight.

One of the things that's been so great about COVID is that I used to, before COVID, sometimes go and have lunch with CEOs in their offices to try and find time to source for a role. It was very difficult because the world was wide open; it was very difficult to fit in with all of the crazy schedules of high-performing executive directors or CEOs. So, the great part about it is now we've got a captive audience where everyone's at home, everyone's on Zoom. I think I even said the other day as to where before COVID we actually had phone calls, and now, I don't think I ever get a request for a phone call. Everybody wants to Zoom.

But to that point, we are ever more accessible to one another. And because of that, I would say really take advantage of the fact, like I just said, that you have a captive audience. You want to recognize that one of the greatest benefits of having a search partner, whether they be internal or external, is that you don't have to just post the position and pray. We don't post and pray. What we do is we actually go out and search for the right candidate. So, those candidates that would not otherwise be responsive to the email, or would if they had the time or if they were sitting in front of their computer is now sitting in front of their computer all day long, and I would say outreach is probably the best way to source for candidates right now in this COVID environment.

And the other thing is not to be too restricted by the fact that it is COVID. Don't make assumptions that because it's COVID, people are not going to want to move jobs or that people are not going to be interested in discussing opportunities. We have found quite the contrary, whether it be because people have had time to sit at home and think because they're not traveling as much, or if it's been on a maybe even more negative side, that they were not necessarily pleased with the organization's response to any number of the pandemics that this country has experienced over the past year, whether it be the social and racial injustice or the COVID-19 pandemic. Mission-driven and high-performing executive leaders are a captive audience right now and I would say to really take advantage of that.

Danisha or Jami, anything to add?

Jami Armstrong: The only thing that I would piggyback on or just add is the organization being open to considering remote work. We're all home, and a lot of organizations are really tying their hands, working 100% remote, but still seeking local candidates. And if you have an organization that does not require you to have a candidate that's local, you are going to significantly increase your pool of candidates by looking at candidates nationwide.

Danisha Martin: That's a great point. And actually, the next segment of the presentation does go into a few more tips and best practices around how to source in this environment.

Myra Briggs: It looks like someone was all up in Danisha’s slides, but it's okay, we're going to get to that. If I could just re-iterate a point from Jami's conversation just a moment ago, that compelling position perspective is a fantastic way to draw in and attract those candidates that are going to see your announcement posted somewhere and it does really good work at attracting the mission-driven and high-performing visionary leader.

And the reason it does that is because the perspective versus the description, as Jami mentioned, is going to be in a narrative document that will allow you to really dig into the mission of the organization. Specifically, where the new leader is going to fit into the future growth of the organization and where this new leader can really fit into the micro and macro differences that the organization is able to make in alignment with the mission. And so, it tells a much more compelling story. In addition to that, you really have a great opportunity to remove biases that could potentially be seen in the position description in terms of any ordering of qualifications, or people thinking that they need to meet every single bullet point in a description in order to apply. A narrative document really does a better job of helping a candidate see where they fit into the overall strategic visioning of the organization and making that connection with their background and competencies rather than a bulleted approach where they will be doing a one-to-one of, have I done this? Have I done this? And if they haven't, many cases, you would miss out on a fantastic candidate. Because for the high-performing person, one of the ways that they are so high performing is that they are self-aware and hold themselves accountable. So, a candidate like that would not often apply for something that they did not think they were qualified for. A perspective versus a description is a fantastic way of attracting that type of candidate.

I'm going to pause there and introduce Danisha Martin for the next section of our presentation, where she'll be talking about translating those key leadership needs that Jami mentioned into conversations with new executives.

Danisha Martin: Well, I appreciate that, Myra. And Jami, thank you for really laying the foundation. I know that we've mentioned it a couple of times, but it can't be overstated. This discovery process piece of the process—that was a little tongue twister there—this discovery process piece is so key because it literally lays the foundation for the entire rest of the search. Just think of how your mom used to say, "First, you have to plan your work, and then you work your plan." And so, when you start with the end in mind, you will ensure that you have a smooth process, and as Jami mentioned, that you'll be attracting the candidate that you intend it to attract.

So, getting into the next part of our flow, you want to be able to translate the major organizational concerns that were lifted into discussion points with your executive candidates and really use those points to target who you're looking for, as well as how you discuss the opportunity itself. A lot of times, we'll work with a client, and there'll be a little bit of, I don't want to say bashfulness, but they'll hang back in terms of their level of transparency.

But you want to keep in mind that your ideal candidate sees challenge as an opportunity to lead change, and they want to make an impact. So it's okay to be a bit transparent and to be a bit vulnerable in your approach to engaging your candidate pool. This is another reason why oftentimes a client will decide to employ the services of a firm, like Impact Search Advisors by Nonprofit HR, because it's an easier story to tell when it's coming from a partnering firm. It's almost like your high-level candidates feel like they're getting a bit of a peek under the hood, if you will, from a partnering consultant, so keep that in mind.

A strong change agent is, again, someone who runs toward the fire, and as the youth might say, they want to smoke. So, again, it's okay to put your story out there. And as Myra shared, and this is so important, you want to be the one to tell the story if your organization has been in the news, or if there's been a bit of backlash because of all the pandemics of 2020. You want to get out in front of that because it can actually be a way to attract the right candidate versus what many clients think in that they're going to repel the right candidate if we tell all our business. So, there's a way to package that. Over the next few minutes, we're going to get into that. There's six areas that flow into how you develop that story, how you develop the right vetting process and then how do you discern the alignment between the candidates that you've identified and the needs that you have identified as well.

In developing your initial vetting approach, we'll take the first three pieces of that six-piece puzzle, and we'll go right into how you are going to source and identify these passive candidates versus your applicants? Now, we're not saying, don't post. Of course, you want to post. But you don't want to leave all of your efforts or your expectations for the right candidate from your posting efforts. So, post, and then go ahead and pray, over the post, but then you also are going to very actively, actively source. So let's talk about what that approach looks like.

Here's where you low key employ your stalkerisms. It's okay in this vein because you're going to look at the social media, you're going to look at the internet footprint. It's okay to look at tweets and how individuals are posting and what they're blogging about. Why? Because you really want to attract those candidates who are already doing the work, whose core mission reflects the mission of your organization. And this is important because when you're engaging a passive candidate, you want to be able to speak their language, and hopefully their language is your organization's language. So, you have to do a little bit of research around that and figure out if this is the kind of person who was already operating in those spaces.

Observe what kinds of problems they tout that they're good at solving. You can use things like a Boolean, Advanced Boolean searches, on the internet and within LinkedIn and other platforms to put up some key words and some key phrases that you know are especially important to the need of that particular executive position.

Then, when you reach out, again, you're not just kind of on mass, dropping just a bulleted job description in people's inbox, because they will ignore it. And, oftentimes, when we finally engage in a really hot candidate who wasn't necessarily looking, they'll say, “You know, I get tons of outreach like this every week and I always delete them. But yours really spoke to me.” That can't happen if you haven't taken all of the steps that Myra and Jami took us through to this point. So, you want to be able to leverage that information so that when they receive your invite, they may know instinctively that it was a mass letter or mass note, but it won't feel like a mass note. So it may say, “Hey Jami, during my research to identify a strategic change agent…” Or it may say, “Hey Myra, while seeking an HR expert in culture transformation, I came across your profile.” And that is really starting to speak the language and draw in the candidate that you really want to talk to. Then, when they go to the link, it's this amazing narrative that Jami and Myra spoke about. Again, you want to start to sell. You want to start to softly sell your organization and the opportunity to make an impact, because those are the leaders that you're really going to want to talk to.

Now, I also want to say something here that in sourcing the passive candidate, this is a great place to get referrals. Jami, she couldn't have said it better, referrals are your low-hanging fruit. At every step of your process, if you're not getting referrals, you're missing out on some really juicy choice pieces of fruit.

Put little hints in your outreach that says, “I came across your profile while doing some research, and if you or someone in your network is interested, feel free to share this, feel free to post.” In fact, I’m getting ahead of myself because I'm so excited about this.

When you are reaching out for someone who is either a part of a very high-profile organization or they recently joined an organization within the last year or so, it's okay to “bypass” them in your outreach. In other words, say, “Hey, I'm reaching out to you for networking and I'd love to learn a little bit more about how you landed, where you are, and also talk about who you may know that might be looking for an opportunity in the political advocacy space,” for example. So, that way, you let them save face a little bit. If they are looking, they'll raise their hand, trust me. But if they're not, then it's not like you’re coming off like you're trying to take them away from a brand new opportunity that they just landed or what have you, so it requires a little bit of finesse there.

We've talked about that, again, initial outreach to the passive candidate. Now, you have to move your process into that initial screening. The initial screening is not your deep-dive interview and this is another area where we see our clients maybe make a bit of a misstep, where they jump right into hardcore interview questions. You want to warm candidates up. It's good to have a couple of touchpoints with a candidate, so that you can see them in an informal environment, you can see them when they know they're being interviewed. You can see them when they know they're supposed to offer a presentation. So, this screening is really your initial opportunity to see how they show up on a phone call. Are they an active listener? Do they cut you off at every turn? You start to get some of those soft skills and really understand who this person is and how they show up as a leader so you can carefully designed the screening questions as open-ended questions where you can allow the candidate to almost feel like they're guiding the conversation, and see what their stream of consciousness naturally goes. If you know that diversity, equity inclusion and belonging is very important to your culture, are they introducing that into the conversation proactively? Is that already top of mind?

It's also important in this initial screening process to confirm their genuine interests. Just like sometimes we're shopping around and building a pipeline, candidates are doing that, too. They have zero interest in moving. And, this process takes long. You don't want to make it take longer because you're engaging non-serious candidate, so find out if they have thought about the timing of a transition. Have they thought about relocating? If you're talking to someone in Oakland and your opportunity is in Chicago, do they have a network in Chicago? What's driving their decision or their openness to talk to you about an opportunity in Chicago?

Confirm minimum qualifications. Sometimes, if you're on LinkedIn, it's a little bit nebulous. Do they really have a CPA? Did they really finish that master's? Are they a candidate? Confirm some of those things so you can tighten up your candidate profile of them and then also confirm salary alignment. Again, this is a great way to leverage the services of a search firm because oftentimes, it feels a little bit premature to engage a candidate around salary expectations way in the beginning. But if you have a search firm, it's a little bit easier to pull that off. So, again, legally, we do not ask any candidate what they currently make, but there's ways around that. You can say, "Where are you looking to land in your next role?" Or, if it's a very passive candidate, "What might you require around salary and compensation to truly consider a real viable?" Then, they'll fill in the blanks for you. So that's a little bit about screening.

One other thing I want to say about screening is go ahead and set the expectation for the selection process. If you are at the very beginning of your search and you've got a hot candidate who has a couple offers on the table, you want to have that conversation then about their level of interest right upfront because you might know that it's another four to six weeks before you even present your shortlist to the hiring manager or in our case to our client altogether. So, have those conversations and your prescreening as well, and then if you discover after your screening they're not aligned, get referrals.

Okay, so let's talk about the interview. Now, when you have highlighted that these are the candidates that, after a screening process, they have the minimum qualifications, they have genuine interests that are aligned with what we're looking for, here's where you want to take that deeper dive. And both here at Impact Search Advisors as well as with the actual client, you want to do these interviews either face-to-face or using a visual platform so you can get a fuller picture of candidates communication, be it non-verbals or what have you.

A behavioral-based interview question, many of you are very familiar with what that is. But to summarize, it's really focusing on what they've actually done in the past. Candidates will often try to answer with hypotheticals or with their approach would be. A lot of times, that is a key, or a code, for haven't quite done that, but I know I could learn it. I'd much rather have a candidate say, "Hey, listen, that wasn't a part of my most recent role, but a few roles back here's what I did." or "A similar or a transferable skill that I have is…" and let them give you an example. If they don't do that, your behavioral-based interview question will help to steer you and guide you to drilling down deeper until you get the real answer. Do they really have that hands-on experience? Or are these all hypotheticals?

And how are you going to come up with those questions? That's where, again, because you laid that firm foundation, you go back to the strategic goals and key initiatives that Jami spoke on, and you use those points to inform your behavioral-based interview questions. Again, if you're partnering with a search firm, that's where we can help to create that interview toolkit. Let me tell you that is a huge value because after you have gone through umpteen resumes and screenings, sometimes the last thing you're thinking about is, “Oh, I have to put together the questions.” But, we're on top of that for you, and it's a collaborative process to make sure that the questions are in the voice of the organization.

The other thing it ensures is a fair and equitable process. It's easy to go off on tangents once you get into an interview, because you've got these great candidates and they're bringing up subjects, and you want to drill down and ask follow-ups. All of that is perfectly fine. It's great too. Offer those unique follow-ups and deeper-dives. But if you've got the core of the same questions, then every candidate gets a fair opportunity to respond. Also, in our toolkit, we offer rubrics to help you evaluate those, what can often be qualitative answers, and that's very helpful. Then, of course, guidance on what not to ask to keep you out of any legal hot water or troubles there.

So, we spent a lot of time talking through screening and interviewing, etcetera. But you might be thinking, “Hey, this is an executive level candidate and after a prescreen and after an interview, that's getting us started, but it's still not allowing us to validate if this is really, really the person for our organization. What else could we possibly do?”

You can design a relevant case study, and this is something that is very, very helpful. And it's a strategic way to, again, let them see under the hood of your organization. Because in creating that scenario, you can use, with some minor tweaks, something your organization is currently going through. Or you might use something that your organization recently came through. Just as my pastor says, you're either in a storm, just came out of the storm or headed into the storm. So use that if you know there is something on the horizon for your organization, put that in the case study and you might even get some ideas. Even if that's not necessarily the candidate that lands the position, you must remember that. Use that to your benefit when you're putting together a case study.

Here’s another thing that you can do when putting a case study together. Maybe your organization is super fast paced where everything seems urgent, and maybe because of the subject matter of your organization, it's super hot in the news, for example. We recently had a client that was in the political advocacy space during the election, and so there was a lot of moving parts. They were in search for not one, but two very critical C-level positions. And so, as a part of the case study, we put multiple challenges together and ask candidates to simply present their recommendation, prioritize how and why they would address things in the particular order. And that really gave us such strategic information about how they process and synthesize information and what they view as urgent and important. So, that's another way that you can work through a case study.

It might be helpful, Myra, if I give a quick example of an actual case study we did. So, without revealing my client, I'll say the case study essentially was to develop an interactive 20-minute presentation that shares an approach, a facilitation technique or an example of your work that you could bring to our organization that aligns with our theory of change. We're interested in how you connect our theory of change to your own approach to social change. We'd like your presentation to be visual, include active participation and offer a clear takeaway.

Believe me when I tell you that one little blurb led to so many different types of presentations. And it's vague on purpose, so that you really get an understanding of what a candidate can bring to the table, and even consider how long they had to work on their presentation. So, I'll stop there cause I don’t want to give you all my secrets, but these are just a couple of ideas that can help you further vet your candidates through a case study approach.

And again, by doing so, the candidate has a chance to demonstrate their thought processes, their approach to decision making, and it's almost like a capstone because you can see all of the non-verbals, all of their presentation skills, you can see that nebulous executive presence and poise that we're always looking for. Again, it gives you another data point, if you will, to incorporate with all the other data points that you've collected to see if this is the right candidate for you.

Finally, we want to look at how do you discern alignment with your organizational culture and with the needs of your team from a human resources standpoint. And this is super important because someone could just be a wonderful presenter, and they can be a wonderful interviewer. We've seen that before. Oftentimes, your executive candidates are very good at that, and that's a part of the puzzle, but not the whole puzzle.

Then you want to have a process in line that helps you just to further double down and make sure that they are really aligned with who you are as an organization. There are a number of ways that you can do that, one is through assessing using a leadership behavioral tool, and there's so many to choose from. Everybody has heard by now of DiSC, Myers-Briggs is another great one and one of my personal favorites is CliftonStrengths by Gallup because I love the focus on what candidates are already good at. But another one could be True Colors. In fact, here at Nonprofit HR, Jessica Ashburn is our resident True Colors Analyst, and that one is also very helpful. Then, I believe Jami Armstrong, who's newer to our team, is a certified Personal Development Analyst. And so, the PDA is actually a tool that really uncovers the situational behavioral leadership style of your candidate. And when I tell you, for an investment of five to ten minutes, this super highly accurate report spits out a 20-page assessment of how this person will show up as a leader given various situations.

And actually, Jami, it might be helpful to know from you, what would be the benefit or the value that you might bring as someone who can interpret a PDA assessment for a candidate?

Jami Armstrong: The science behind interpreting the data that comes from the brief interaction with a candidate is so in depth. And to your point, that five to ten minutes really does generate a lot of information about someone, like how they would operate normally day to day, and also how that translates into a leadership role. Because there is such a science behind it, to use it without having someone that is certified, you could certainly run the risk of misinterpreting the data and possibly missing out on a dynamic candidate. And then, on the flip side, truly being able to interpret data, you're able to authentically present to your clients exactly what it is that they're looking for in a leader.

Danisha Martin: That's great, and so true.

There's been a number of times where we've come all the way through the process. And then based on the results of the PDA, a client might be a little unsure and think, how do I use this information to help me either strengthen my decision that I already made, or did these results challenge me to think through my decision a little further? And none of these tools should be used in a vacuum. They should all be used in tandem with one another, looking at the holistic picture of your candidate and of your candidate’s performance.

Another way that can help to discern that alignment is through references; good ol' reference checks. And, there's a lot of data out there about how effective a reference check is. However, I want to impress upon you that the reference check in this case is going to serve to help you see alignment in what you've already seen for yourself.

For example, if you know a key piece of your need is around staff management and leadership. And you go to the PDA results, and it shows that this leader shows up in this way. Maybe they are rules oriented and super strict and maybe a bit rigid, and your organization is a bit more fluid and informal, that might raise a flag. But then in your references, it might talk about how that person shifted or showed some flexibility or agility, so that can help to assuage your concern there. Or it might double down and assure you this is a super rigid manager, so that can also validate what you've already seen.

But yes, do the behavioral leadership assessments. Move into your reference check. Then, again, go to the good, old stalker energy—I'm being facetious, it’s not really stalker energy, but sort of.

Because, for example, when you look at the social media scan and your organic research, it's natural to want to see what they are posting on Facebook or Instagram. Or what, when “nobody's watching,” though we always know on the internet everybody's watching, how are they showing up? And does that continue to tell the story of what they're telling you, or does it really kind of intersect and oppose the story that they're telling you?

For instance, if your organization is a political action organization, super liberal, and you see in all the social media that this candidate is super conservative, that may cause for concern. Not that you don't necessarily hire them, but it's definitely a point to dig deeper into. And so, again, just keep in mind that all these things work together.

From there, really and truly, you've got a fantastic approach to, again, from your discovery process, lifting and amplifying those deep issues; leaning into the challenging elements of what this person is going to need to do; making sure that you're getting in front of that population of candidates that possess those skills that are naturally aligned to your organization; and taking them through a well-thought-out vetting process that's thorough and it looks at the individual from several different sites. Now, you're ready to round out your search so maybe Myra, you can help us land this plane with some best practices around process and timing?

Myra Briggs: Absolutely. We'll pause for some questions here, because we want to make sure we get a few in and I know there are quite a few. We will do some now, then I'll do the finale and then we'll take the rest.

Alicia Schoshinski: Yes, we do have a bunch of questions. One question was related to when you were talking about putting together perspectives and what was really needed for the job. Someone asked: What are the tools that are needed to assess the leadership competencies that you would need for an executive role?

Myra Briggs: Sure. I can jump in here. Honestly, the tools that you need to assess, and when we hear the word tool, it always makes me think that people are looking for some sort of an assessment that you can put the competencies in and then feed the person's resume into it afterward, and the machine pump comes back out and says, "Yes, we found a fit.” I don't know, that seems like something that the Jetsons would have had.

So unfortunately, we don't have anything that will make the decisions for us at the executive level. But what I can say is that the greatest tool that you have is your preparation. It's also important to be honest about how much time you do have to prepare, and how much time you do have to dedicate to the process. Unfortunately, recruitment is not one of the places where you can take shortcuts. When you do take shortcuts in recruitment, almost certainly there will be backlash on the back end, whether it ends up being just a misalignment that goes on for quite some time because we no longer can afford the downtime, so to speak, to hire someone new. Or, it could really just be that things have gotten so bad that there really is a stoppage of work, whether it be at the executive level or through the associate and assistant level in the organization.

And so, if I can give you some tangible tools to use, it would be about being accountable to what has gone wrong and what has gone right. Be holding yourselves accountable once you get to the end of the process to absolutely ensure that you are really hiring from one that meets the qualifications that you set out in the beginning. And if you are not hiring someone or you are making concessions based upon something that you called a must-have at the beginning of the process, make sure that there's a real commitment from everyone around the table that they understand that we are changing the qualifications here, and we understand which pieces of our strategic plan need to also change to support that. And if we're not willing to go that far in order to change a competency, then it shouldn't be changed. Because you're changing it in a blind environment, or in a bubble, which will most assuredly end up in a disaster of varying levels, depending upon how big of an offense it is.

So, I would say that it's important to keep yourself accountable once you have developed the key competencies and qualifications, and don't veer from that as you are developing the position announcement, don't veer from that as you are going through the vetting process or the interviews or when it comes to making your selection. Unfortunately in the end, that does sometimes mean that you do not have someone as quickly as you want to, but doing that assessment at the beginning, as to whether or not you have the time and commitment to dedicate to an executive search process, is when you decide on who your search partner will be. If you don't have the resources internally to go through all of the intricacies that are required to select an executive successfully, then it may be best to select a partner, and talk to people about what services they have available. There's no shortage of options that could meet those needs.

Danisha or Jami, anything to add there?

Danisha Martin: I think the only thing that I would mention that wasn't already baked into the flow is remember that you are going to have the benefit of reviewing resumes, reviewing bios and fact checking, if you will. Oftentimes, you might receive a bio or a CV or resume, and you can go back and look at the track record in the news, you can go back and look at the digital footprint that candidates have left. While there is certainly a space for candidates to move into new roles, one of the big markers of potential success in the future is success in the past.

So, you'll be able to see if this is a candidate that digs their heels in and sticks around for five plus years? Or is this a candidate that every 18 months is onto the next? Not saying that's not your candidate, but it's something to dig more deeply into and understand what the motivations have been for those moves. When it comes to tools, oftentimes search can be a bit more of an art than a science. But there is a bit of both mixed in, so you want to look at all of these factors together to come up with your holistic toolbox, if you will.

Jami Armstrong: And if I can just add a bit to bring what both of you said full circle, there's obviously a lot of due diligence that goes into this process. It requires a lot of bandwidth, and it is very much why we're very busy.

Alicia Schoshinski: And team, just related to that, you're talking about doing your research on candidates. Someone asked if it was a good idea to review a candidate's social media history, as a candidate with inappropriate social media posts would be ineligible for the position? What's your advice on social media reviews?

Danisha Martin: I'm thinking that question might have come in before I got to the social media part. But just to reiterate in case someone had to come in and out, that's actually baked into your vetting process even from the beginning. Again, you may not do a super deep dive on social media for every single candidate that you screen and that you assess, but once you get down to your semi-finalists and your finalists, you definitely want to do a scan because that can make or break a candidate's candidacy; it absolutely can. Especially if we're talking about an executive director and chief executive officer, and they have something out there that's super racially offensive, for example, or any number of things that could disqualify someone for having what they need or having that core integrity that your leader needs. So, you definitely should do that. But, again, where you do that in your process might vary.

Myra Briggs: Absolutely. And if I could add one more piece to that, you want to also be careful at the point that you start doing some of this due diligence because you could start scaring candidates away.

If you're, for instance, looking at their LinkedIn page, and they know that they submitted an application to your organization, and now, all of a sudden, so many people that are connected to this organization pop up in their Who's Viewed Your LinkedIn Profile, they might get scared away. Because I don't know anyone who's working that, at the beginning of their search, their current supervisor or employer knows that they're looking. So, there's a level of confidentiality that absolutely must be baked into every search.

A piece of advice when we're talking about suggesting a little bit of stalker activity, do it in a controlled environment in which you have waited until you get to a finalist group of candidates, where you're down to two or three people and you've let them know you’re getting ready to start checking references. You can even slip in there that this will be the given references, as well as any others that you can find and get their clearance there because then they'll have an opportunity to set things up, so that they don't get into any trouble, which is a very important factor as well.

Alicia Schoshinski: Yes, and thank you for clarifying that. I actually didn't read the question properly, it was about what stage to do that, so I appreciate you sharing that.

We do have many more questions, but I'll let you wrap up if you'd like, Myra, and then we can go back to the rest of the questions.

Myra Briggs: Perfect.

The most important piece of all of these processes, whether it be a short-term replacement, meaning you've got executive B, who was only there for two years in a turnaround environment or if it was executive A, who's been with the organization for 12 years, is retiring and may even give you a bit more if it becomes necessary. Timeline and expectations are where everyone starts. What can we expect? How long is this going to take? And there'll be another piece that you'll add if you're going with the search partner with how much this is going to cost. We won't tell you that today though.

But we will help you with the timeline piece of it. Ideally, right smack dab in the middle, you want a year once you know that an executive is departing. That gives you enough time to do your prework, to get into the selection of your search partner, to run the process, to make negotiations and to onboard someone.

Unfortunately, you're not always given that much time. As a result of that, you can take the points that we haven't mentioned today, as well as the points that I will quickly go over through this resource from BoardSource and condense them in a way that makes sense for your timeline. But it's really important that you hit each one of these pieces, even if in short form, so that you don't miss anything.

It stands to reason that hiring the CEO, or the executive director of your organization may be one of the most important hires. It affects culture. It affects the organization's ability to deliver on mission. And then, if we're thinking about why nonprofit organizations, mission-driven organizations, exist at all, it's to solve a problem in the world. And if you make the wrong decision in the hire of your CEO, you may be inhibiting your organization's ability to solve the problem that it was created to solve. So, if you think about that as you're preparing to manage an executive transition, then the commitment to the process becomes even that much more important, and we cannot stress enough how important it is for you to get those commitments from your transition committee in the beginning, from your search partner in the beginning, whether it be internal or a firm like Impact

Search Advisors by Nonprofit HR. And get everyone around the table committing to what you determine is the right profile for your next executive leader.

This graphic on the screen really does show the departure-defined succession planning process, where you go from preparing, in all of those discovery conversations that we talked about, all the way through pivoting, through the conversations that we talked about with Jami in identifying those needs and communicating them to the marketplace. And the thriving is the part that Danisha spoke about, in which you are actually going to market with the qualifications that you've identified to meet candidates that have applied and even to search those out who have not. Then, you really do have the partner that is required in order for you to have mission sustainability moving into the future for your organization.

So, commitment is the name of the game because this type of hire is going to affect every piece of your organization. We're always happy to have discussions as you are preparing to embark upon an executive transition. Even if you're thinking about, what are some of the qualifications? What are some of the things that we should be looking for in our search partner? I've even had calls with potential clients asking, “Well, I interviewed my chief human resources officer for all of the things that she does today. I don't know if she can manage an executive search.” Well, then the question is to ask. Because there are different competencies across the lifecycle of human resources where people have different levels of expertise. And you really do need someone who has expertise in executive search and managing your executive search, especially for anything in the C-suite or your executive director.

I will pause there. I know we've got a lot of questions. I could talk about these things all day, just as any of my colleagues can, but we want to make sure that we have an opportunity to answer as many of the questions that you all have submitted as possible. I'll pause there, and we'll jump back into this if there's time later. Alicia?

Alicia Schoshinski: Great. Thanks Myra, so one question we have is: How much of the search process should you communicate to staff and how involved should staff be?

Myra Briggs: So, I'll start there, but I know each of us has some ideas here.

My first rule about staff and stakeholder engagement is don't quantify anything, even when you do present updates. No one needs to know how many candidates are in the pipeline, how many interviews are being conducted, how many applications were received, etc. because numbers cause people to draw conclusions. You can be very thoughtful about giving a very real update and assessment as to where you are in the process, but the numbers that you are giving are going to change so much that there's no way that you'll be able to keep your stakeholders up to date from a numerical perspective.

However, I would definitely go back to one of the first things that I said, which is if you don't tell a story, somebody will. And so, to that point, you need to develop a communication strategy for your staff, and for internal and external stakeholders, letting them know what the plans are. Acknowledge the departure, and once you've acknowledged the departure, let them know that a plan is in place, if it is. If the plan has been to engage a search partner outside of the organization, let them know that. And then once the position has been posted, you post the position, ask for referrals and keep them up to date about monthly on where the status of the search is. And that's through communicating: we're in the discovery process now, the search partner is vetting candidates now, we're doing interviews now, we are prepared to make a decision. Those are the four places that you really need to keep stakeholders and staff up to date.

In terms of where staff should be involved, staff should be involved from the very beginning. If there's a smaller staff, 12 people or less, I'd say that every member of the team should be involved in a portion of the discovery process by way of either panel interview or individual interview for some senior leaders, just to get their insight on the new leader. If it’s larger than that, you can do focus groups or you can do a select group. But you have to be a bit more careful about how you engage people when you're having to pick a diverse group of people. I'll pause there. Danisha or Jami?

Jami Armstrong: I just like to throw out a stat, if you will, three in four employees see effective communication as a number one leadership attribute. So, it is important to be inclusive but to Myra’s point, be strategic about what that inclusivity looks like.

Danisha Martin: Yeah, I was just going to add, and it piggybacks off of what Jami just shared, that if your organization is facing a scenario that is sensitive or for example, if the reason why you're doing this search is related to a performance issue or a culture issue or anything like that, this discovery process, including staff, is really critical.

And so, you may want to be mindful about the way in which you engage staff in that discovery process. For certain staff, it might be best to meet one-on-one. You might want to be careful about how you put together focus groups, and not have them at random, but have, for instance, the direct reports of this person to meet together and board members in a separate meeting, things like that. So, it's very important to incorporate them, so that they know that their voices are heard. It's also very important to be mindful about the ways in which you do that.

Alicia Schoshinski: Okay, and then another question we have relates to once you've selected a leader, or maybe even during the process: How do you share existing concerns and issues with a new leader in a tactful way?

Myra Briggs: I'll be honest, there isn't always a tactful way depending upon what the issue is. And I think that at some point, we have to recognize that we're courting on the way to marriage, if I can use that analogy, when we are screening and interviewing candidates for a CEO or executive director role. Keep in mind that once they are a part of the organization, there will be nothing that they won't know about or at least nothing that they should not know about. I think it's important to begin that relationship early on with finalist candidates. Under the cover of a non-disclosure agreement, I think it's important to just be completely honest about what the issues are.

I think it also stands to reason that those issues that you're thinking about delivering in a tactful way are probably most honestly relayed in a non-tactful way, if we're being completely honest. Because you really just need to lift up the hood and show them the busted engine. Just lift it up and tell them, this is how bad it is. This is what you're going to have to fixed when you get here, does that scare you? There's absolutely no benefit to a search committee or an organization trying to sugarcoat the current state of an organization when you're trying to find a leader to come in and potentially fix it. If there are issues, I'd say be candid. In the beginning, you want to slow walk it, you don't want to give all your isms on the first date. But once you recognize that this person is really interested, and you're really interested as well, and you see many synergies and what's required for success, then it's time to pull the gloves off and really give it to them straight. Have an NDA drawn up, have them sign it and show them just how bad or how good things are.

Danisha Martin: Yeah, that's so true, Myra. And what I want to also lift up is, taking that analogy an step further, when you are in that dating and courtship on the way to marriage process, there is tremendous value that you bring as an organization in the same way that there is tremendous value that the candidate brings. So while you may be a little bit timid to say, "Hey, this is what we've got going on," you've also got the history of your organization, its strong mission, everything that it's accomplished, the resilience that it's moved through in 2020, you've got the people, you've got so much to offer. So just know that, and I hope this doesn't sound too kumbayah, but know that for the right candidate, they're going to lean into the fire versus be scared away. If they're scared away, that wasn't your candidate. So, yes, slow walk it, but don't be so timid that you don't share with the right potential leaders what's truly going on. Because even that process will help to lift who's right.

Sometimes you're recruiting someone who has been in an interim role, and they're ready to rest. You may be recruiting someone who was a consultant, and is now ready to have a deeper level of impact with one organization. You may be recruiting someone who has been looking for an entry point to the C-suite and has been a senior VP for a while and so that's attracting them. But there's always a number of motivators that will balance out whatever is going on in your organization for the right candidate.

Jami Armstrong: Just to piggyback off of that, those are the things that we uncover in the comprehensive discovery process. We have certainly found ways to gather information that confirms that there's always more good, it always outweighs the bad. And as far as transparency, we have found that candidates are much more receptive to the expected versus the unexpected.

Alicia Schoshinski: Okay, great. Then somebody asked a question about processes you'd recommend for screening or interviewing candidates to reduce unconscious bias and to make that assessment more objective?

Myra Briggs: I'm going to pass that to Danisha since she did our screening and sourcing section, and then I'll piggyback.

Danisha Martin: Yes. I'll get us started on this. For one, definitely keep things the same. When we were talking about taking some time to really think through what your screening questions are, think through the way in which you'll ask them and think through the deeper behavioral interview questions. All of those things are going to help set you up for a fair and equitable process. And remember, the more open ended those questions are, the more information you'll get so, you don't have to lead with what might be a culturally-biased question. You can make the question even more open, especially earlier on in your process.

The other thing is in writing your perspectives, and just a note about that, and Myra and Jane touched on this, is oftentimes women candidates tend to want to check off every single bulleted point of what's required for a role before they turn in an application. Whereas oftentimes, male candidates will say, "Hey, I've got the top one or two listed, those must be the priorities and I can work it out with the rest." And so that's one of the ways, believe it or not, that the narrative prospectus actually sets up your search to be less biased because both women and male candidates alike will read that and get a more holistic view of what's needed. And, if it speaks to their core, then they'll go ahead and apply. Or they'll say, "Hey, I need more information," and then you can back it up with the bulleted list to fill in the blanks. So, those are two ways that you can, two approaches that can definitely help to, screen out bias.

And then there's also some tools, I can't remember the name of it, but it's like Grammarly where you can go through your written postings and go through your written materials, and it will highlight any areas that might be biased if you don't have another process in place. But, yes, those are some of my thoughts about that.

Myra Briggs: Absolutely. Just to piggyback off of what Danisha said, a couple of other things that you can do is reviewing those announcements for words like guru or master. Understand that, while I certainly don't think of a gender when I hear guru or master, does not in any way mean that someone else might not, because if we're being honest with ourselves, we do understand that those are engendered words that have a masculine connotation to them. And so just being very careful not to use those types of words because there is an effective way to say that someone is the master of something, or someone is a guru at something, without using those particular words. And it's also important to, we started using she/he/they to describe as pronouns throughout the course of the position announcement. And what it really does is that it acknowledges the fact that we can see any person in this role, which is really what you want to convey with that position perspective.

Alicia Schoshinski: Okay, and then we have a question about internal candidates: If you have a very strong internal candidate, somebody that could potentially be ready for your executive role, do you need to run a full search or what would you recommend?

Myra Briggs: I think if you have to ask the question at all, then the answer is yes,
I would recommend a full search. Mainly because, if there's any question about the person's ability, it only behooves both sides to do the full search, and have that interim person emerge as the “champion” or “winner,” so that there's no doubt and all doubt has been removed about whether or not they were the right fit or if you settled.

Now, I think there are instances where the deputy has been coached, has been developed specifically for a CEO or executive director role, and the succession plan dictates that something like that should take place. And if there has been thoughtful progression in that, whether official or unofficial, then I think that there's good support for promoting in a direct a deputy director into a CEO or executive director role. But if everyone around the table is really asking the question, even if the person is fantastic, the person does not have any deficiencies and we just love them to pieces. But if there is a question about what else is out there, then I would implore you to see.

Alicia Schoshinski: Okay, great, and then a final question has to do with preparing staff or a new leader: If you have gone through something maybe a little bit more traumatic or there was a lack of trust, any advice on, once you've selected that new leader, how to get your staff prepared for their arrival and for them coming into the firm or into the organization?

Myra Briggs: I'll start this one, but I want Jami and Danisha to chime in here.

Honesty is the best policy there. I think a lot of times, boards of directors or executive leadership within an organization, no matter the intention, struggle a bit with transparency, how much transparency to have and how transparent to be about issues that are taking place in the organization. And if there's something that has affected the staff at such a level that we're questioning the readiness of a new CEO, or recognizing the need to prepare, that we do need to "prepare the staff" for a new transition, then an acknowledgment of what has happened is the best place to start. Acknowledging that there has been a hiccup, that there has been a mishap or whatever the thing is that happened. And then, talk through the fact that you are working to fix it with the hire of this new leader. And then, share that with your search partner, whether it be internal or an external partner, letting them know that you really do need to talk about that in your discovery process with the staff because ignoring it is only going to further deepen the roots of those stories that are happening around the organization about what the board is doing or anything else. Then again, we keep going back to if you're not telling the story, someone is telling it for you.

And so, I think it's really important that you address those issues in the beginning. All staff wants to know is that you're acknowledging it, and that a fix is on the way. But, I will say the only reason not to ask is if you're not prepared to acknowledge it and fix it, because that's literally the only thing worse than finding out what the real issues are, is hearing what they are, and then doing nothing. So, at the point that you want to hear it, you absolutely must be prepared to fix whatever is fixable, based upon what you hear.

Danisha Martin: Yeah, I was just going to say it's funny. We recently successfully closed a search for an executive director, and it was scenario A that you posed where the founding executive director, who was phenomenal and has an amazing legacy over a decade with this organization, had decided to retire from that seat and move on into some new challenges in life. And so, they wanted to open up the search beyond their immediate community, and see, globally, who is out there and who might be able to fit the seat well.

This is a smaller organization, a smaller agency, and they attracted someone from clear across the country, and it will be their first diverse leader because the founder who's moving on is white. So, the person coming in is a person of color, and they had a concern of making sure that this person has set up for success, not only internally, but also with their external community and wanted to provide some preparation around that.

So, long story short, after some discovery and discussion around that, they ended up partnering with our diversity practice to take staff and board, and some of the key stakeholders in the community through cultural and DEI assessment in preparation for the moving in or the transition of this new leader. Again, there are tons of resources available. You don't have to go it alone. You can employ an expert who can help set the stage for a transition that leads to a smooth transition and that sets up your new leader for success.

Jami Armstrong: I don't have anything to add around the answer to the question, but just wanted to point out, again, how multi-layered this process is and the benefit of having partners that have the bandwidth to really hold your hand through all of the layers of what this process looks like as subject matter experts.

Alicia Schoshinski: Great. Well, thanks again so much to Myra, Danisha and Jami. You shared wonderful information this afternoon. It was a very inspiring, insightful and timely discussion and I'm sure it'll be helpful for many. That is all the time we have today for Q&A, but I do want to thank everyone who attended today's webinar. We certainly hope you found it to be valuable.

And as I mentioned, you will receive a follow-up email with a copy of the slides, a link to the recording and the recertification codes. Many, many more webinars are coming your way in 2021, so to be sure to check out the events calendar at nonprofithr.com/events. Also, please be sure to complete the feedback survey that will pop up once the webcast has ended. Your comments certainly help us with our planning and can inform the topics we cover as well.

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