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EXECUTIVE SEARCH PREPARATION: QUESTIONS AND EXPECTATIONS

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All arts and culture organizations experience periodic leadership changes. These transitions may be artistic or managerial in nature. They may occur after a period of long, stable guidance under the helm of a single individual or during a time of organizational turmoil. No matter the circumstances, these changes in leadership are accompanied by the opportunity for the exploration of new ideas and transformational growth.

In this edition of *Arts Insights*, we will examine the importance of effective preparation for an executive search process with a specific focus on the top leadership positions. First, we will ask several crucial questions based upon executive search experience in the field that resulted in successful leadership transitions. Then, the roles and responsibilities of the search committee will be explored. Finally, we'll address the requisite amount of time required to do an effective executive search, as well as the importance of stakeholder involvement and transparency throughout the process.

GETTING STARTED

Q: Should the placement of an interim management professional be considered to steady the organization prior to embarking on a significant executive search effort?

Before launching a senior leadership search, it is important to take the time to assess organizational readiness for an effective and inclusive process. Are there any critical issues (i.e. cash flow, program quality, legal, technological, etc.) that may impede the organization's ability to successfully navigate this transition? If an extended period of time has passed since the past executive director's departure and there is no experienced leader to guide the organization while the search is underway, then a professional interim management leader may be an important next step. This individual can execute address critical issues, assess strategic initiatives, and oversee operations until the new executive director is selected. A stable organization will be an attractive one to potential candidates.

Q: Would the organization benefit from the expertise of an executive search firm with experience in leadership transitions and a network of relationships throughout the arts and culture field?

It is crucial to realistically assess whether the organization has the knowledge, capacity, and contacts to internally manage a comprehensive and productive search process – appropriately scaled to mission, scope, and goals – without drawing from resources needed for ongoing daily operations and revenue maximization.

THE SEARCH COMMITTEE’S ROLE

An effective search committee is the ultimate determinant of a successful executive search. The search committee governs and implements the framework and timeline for a thoughtful and comprehensive process. The committee sets the tone for the search internally and externally, keeping stakeholders informed, helping to clarify institutional direction, protecting the important culture of the organization in its community, and maintaining a consistently calm and focused atmosphere in the midst of what could otherwise become a chaotic leadership transition.

Search committee members are often the initial and lasting face of the organization for candidates. Serving on a search committee requires a significant time commitment, including a variety of meetings, materials review, phone and in-person interviews, social gatherings with candidates and key constituents, as well as board reports to keep the organization updated on progress.

Q: Who should serve on this committee, and who should chair this critical effort?

Typical search committees include multiple types of stakeholders: board members, senior staff, artistic personnel and/or faculty, and sometimes those who have a closely vested interest in the selection of the next leader of an institution, such as collaborative partners, key constituents, or major donors. Most often, the committee includes 5-8 people, although in larger organizations, government agencies, or universities, this could extend to a dozen or more. Effective committee members are those who embrace the mission, vision, and values of the organization and are able to effectively present and articulate its overarching goals and challenges, as well as the particular needs and concerns of their respective constituent group. These ambassadors are thoughtful, mature, and evolved individuals who are available to give frank, educated, and sincere feedback, able to respectfully listen to the comments and views of others, and who will maintain candidate confidentiality.

The most effective chair of an executive search committee is, more often than not, a past Board President or President Elect who has the respect of the organization’s diverse stakeholders. He or she is someone with proven, confident leadership skills

within the organization, who possesses a nuanced understanding of its strengths and weaknesses and a compelling belief in its future. He or she may also be the individual who will work closely with the incoming executive, thus building a strong working relationship and rapport even before the hire is made.

GENERAL RESPONSIBILITIES

As the search committee is formed, it is best to ensure that all members understand their roles and responsibilities. Here is a summary of some of the critical obligations that search committee members might expect during a confidential executive search process.

Candidate Qualifications

- Identify the essential skills, experience, personal attributes, communication style, education, and additional specific criteria needed for candidate determination based on the requirements of the institution.
- Review and approve the position description developed by Board, staff and the executive search firm prior to distribution.

Candidate Recruitment & Cultivation

- Assist in disseminating information to prospective candidates and to those within the organization's circle of influence who may have connections to potential candidates, understanding that candidate recruitment is an active process that cannot be fulfilled through advertisements or postings alone.
- Act as community ambassadors, promoting the positive attributes of the organization and the position for which a candidate is being sought.

Candidate Interviews & Evaluation

- Conduct phone and/or in-person candidate interviews with semifinalists and finalists.
- Ask difficult questions and listen carefully, seeking to determine the candidate's qualifications, as well as their motivation to embrace the organization's mission and vision.

Candidate Recommendation

- Recommend a final candidate to the Board of Directors for hire, recognizing that the recruitment of a candidate is *not* fully accomplished until the selected individual accepts a negotiated offer, signs a contract, and begins employment.
- Demonstrate confidence in the candidate publically when the selected individual begins employment.

STAKEHOLDER PARTICIPATION

Beyond the search committee, to further assure the representation and voice of the myriad of interested parties, it is critical to involve envoys from various stakeholder groups as the search progresses. Consider the impact of hiring an executive director of an orchestra without having the candidates meet with the music director and musician representatives. Similarly, imagine engaging a new museum director without involving the senior curatorial, development, marketing, finance, or operations staff. Most organizations understand that appropriate stakeholder involvement in the process will best engage all participants and encourage their buy-in. Ultimately, it will make for a more invigorating and inclusive environment with broad scale input of invaluable suggestions, recommendations, and discussions.

DISCLOSURE OF INFORMATION

The ethical disclosure of an organization's challenges, financial position, structure, and stakeholder perspectives is critical. Candidates expect transparency and distrust organizations with inconsistencies, dated financial information, and hidden agendas. Frank discussions regarding strengths, difficulties, and opportunities offer all parties open and honest perspectives on the potential match between candidate, position, and organization.

TIMING

As the proverb states, *timing is everything*. This is especially true in the executive search process. No matter how exciting and inspiring you believe your organization to be, a certain amount of time and a thorough process is required to ensure that the right candidate is chosen at the right time for both the organization and the selected individual. According to the Arts Consulting Group study *Performing Arts in Transition: Executive Leadership on the Move* and other similar research, it takes at least eight months from the date an outgoing leader gives notice of their departure until the date that a new chief executive is in place when an organization leads its own search efforts. Ultimately, the longer an organization hesitates in initiating its search, either on its own or with a search firm, the greater the chance that it will not be expedited.

CONCLUSION

Despite its complexities and pressures, the executive search process can be a wonderful adventure filled with organizational learning and opportunities. It is a unique moment with potential for organizational unity, which can engage and inspire stakeholders as it paves the way for the future. Assessing the organization's preparedness for a search and clarifying the search committee's role and responsibilities are the first critical steps in an executive search process. Thoughtful stakeholder involvement, an understanding of timing, and trust in "the process" will provide a solid foundation for a successful outcome and a long lasting relationship with the new executive.

Editor's Note: With thanks to Bruce D. Thibodeau, ACG President, who penned an earlier version of this article in 2007.

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Pamela A. Pantos is based in ACG's Boston office, and joined ACG as Vice President in 2014 after six years as executive director of Opera North (USA). She brought Opera North firmly into the black and set a new standard for artistic excellence. This transformation included creating and executing a robust strategic plan, designing a marketing plan that increased ticket sales annually by 15 percent, and establishing a development initiative that doubled the company's contributed income over a period of three years. Prior to Opera North, Ms. Pantos was finance manager for Merger & Acquisitions (North America) at W.R. Grace. Ms. Pantos was named New Hampshire Outstanding Woman in Business 2014 by the New Hampshire Business Review, and featured by Babson College as one of The Entrepreneurs for ACG in their international multi-media marketing campaign at action.babson.edu.



ACG Vice President **Rebekah Lambert** brings more than 20 years of nonprofit leadership experience, with a particular interest in institutional capacity building, board and staff team development, governance and planning to her role leading ACG's Organizational Development practice. Her arts management experience includes serving in top leadership roles with the Eugene Symphony, Symphony of Southeast Texas, and Honolulu Symphony. Ms. Lambert is based in ACG's Portland, Oregon office.

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