



MANAGING TRANSITIONS IN LEADERSHIP

THE HIRING PROCESS

A Guide for Boards of Directors of Conservation Organizations



Introduction

Hiring an executive director is one of the most important tasks a board will ever undertake. If you are a board member or chair with little hiring experience, you are in good company. We've created this guide to support board members at any level of hiring experience.

An executive director transition represents both significant challenges and opportunities for the organization: choosing a new leader and setting them on the right trajectory for a long and successful career moving the organization towards meeting its mission. A clear and fair hiring process also reduces stress, inefficiency, and the time required to get a new executive director in place.

Before you begin, take stock

Assess and clarify your strategy before beginning a hiring process; take a step back to assess the current state of your organization. This can be an excellent time to reevaluate your organization's mission, your vision of the future, and your strategy for getting there. Naturally you will want your new ED to co-create some of this with you, but a successful candidate will also require guidance from the board on where the organization is and where to take it.

Strong ED candidates will expect clear guidance and vision from the board and can be deterred by outdated information in your materials and on your website, so it is worth the work to get your marketing and outreach materials updated. Additionally, being able to provide an ED with a vision and clear mission are critical in setting them up for success, even if you hope that they might help expand or grow the mission and vision over time. Ensuring that you have a shared vision of your organization's future before hiring a new ED is essential.

Board and staff should spend the time required to consider the strategic direction and issues the organization will be pursuing over at least the next three to five years. You can expect this strategic review to take from several hours to several days, depending on how up-to-date and robust the current plans are.

Begin with 'why'

Ask yourself fundamental questions about the organization's history, the constituents you serve and what you can best offer them from here forward. What is your purpose? Where are your organization's priorities now? Where do you see the organization in five to ten years? What needs will you have in getting there, and what obstacles will you face?

While developing direct relationships between board members and key funders is generally advisable, it is particularly helpful as you move through an ED transition. It's important to keep funders informed of your process and any developments, being especially sure that they hear of any major transitions directly from your organization, not through the grapevine.

This “step back” might be as simple as reviewing your current strategic plan. Or it may require a more comprehensive analysis and review. If you determine that you would benefit from an organizational assessment or other significant realignment, then you will want to have this process at least outlined prior to beginning your ED search.

Articulating a clear path forward will help you determine the skills the next executive director will need to get you there, and help you get a clearer picture of the candidate you are looking for.

Would you be best served by:

- A seasoned campaigner
- An experienced manager
- A solid fundraiser
- A visionary
- A mix of the above?

With your overall strategy confirmed, the board and staff can identify the key goals, deliverables or areas of focus for the new executive director to address in their first 6-12 months on the job.

Identify what type of Executive Director best fits your requirements

Once your organization’s strategic direction has been reconfirmed, it is necessary to define the qualities, expertise, and experience you desire in a new executive director. Thinking through the attributes of an ideal ED candidate will help you write an accurate position description.

Your announcement will list the job skills needed to be successful in the position, experience and education requirements, and other factors unique to your situation. Aside from specific job skills, you will also want to think about what characteristics or attributes are wanted or needed for the new ED to be successful. This may require you to review and update the values and philosophies that guide your organization. It also gives you the opportunity to create an inclusive and equitable hiring process.

Assess any changes to the current ED role and its impact on the rest of the organization

Assess lessons learned from current executive director – circumstances change and organizations need to evolve and adapt. It is well worth your time to take a look at what has worked well with both the current and past executive directors. Clarify what you would like to be different in the future. This is especially useful if the incumbent has been in the position for more than three years.

A thoughtful review here can be extremely valuable in crafting not just the executive director position announcement but also in doing outreach to potential candidates. The search committee can use this information in interviews to test a candidate’s match with the expectations of board and staff. It can also help the new ED anticipate and address the needs of the board. This can be an invaluable step in setting a strong foundation between the board and the new executive director.

The executive director transition is an opportunity to identify and begin to correct any planning or organizational issues that may be slowing down your current performance. It is an excellent time to reflect on what's working and what's not working in meeting the goals of your strategic plan. This assessment should also include your organization's size, geographic focus, program delivery, and other factors including things like any specific opportunities or threats you face.

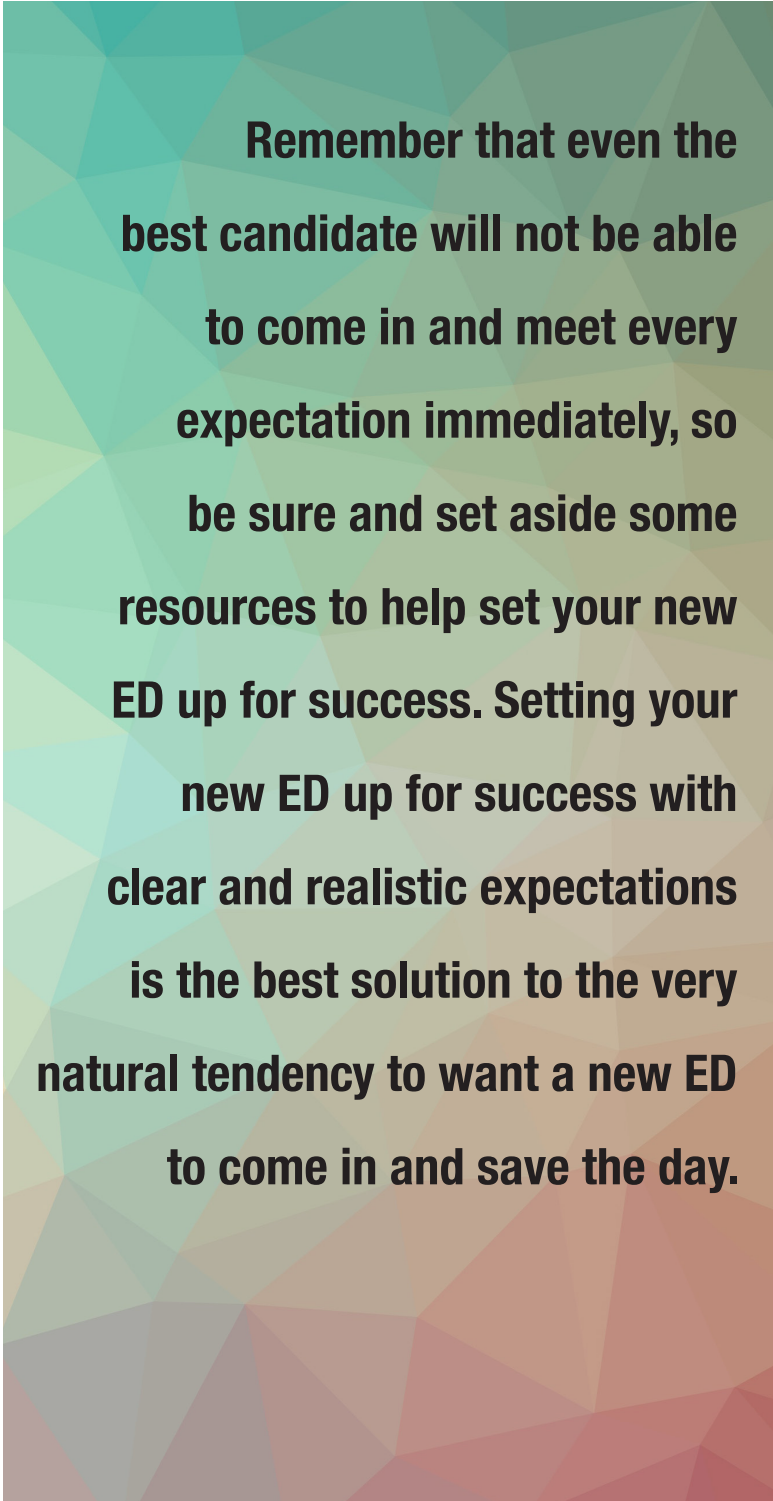
If you are not making acceptable progress towards your objectives, this is the time to assess and adapt. You may need to consider whether you require different strategies and tactics or a different type of executive director to implement them.

Your board should be clear on what specific opportunities there are and use them as a basis in determining the type of leader needed now to best set the direction for the organization.

Confirm executive director compensation and benefits guidelines

It is common for organizations to find that the salary and benefits of the outgoing executive director are not considered adequate in the current job market. Before any job announcement is posted, the board should undertake a review of the compensation range for executive directors in similar organizations. It is important to have this comparable information regardless of the budget situation of the organization, as it provides a realistic assessment of what competitive candidates are encountering.

If the board determines that the executive director salary will have to be significantly increased to attract the level of talent desired, it must also assess the potential impact on salaries in the rest of the organization. It is common to adjust other salaries to address internal equity issues if the salary of the new ED is higher than what it was previously.



Remember that even the best candidate will not be able to come in and meet every expectation immediately, so be sure and set aside some resources to help set your new ED up for success. Setting your new ED up for success with clear and realistic expectations is the best solution to the very natural tendency to want a new ED to come in and save the day.

GET ORGANIZED FOR THE HIRING PROCESS

The process of outreach and hiring a new executive director is often an opportunity to engage with your organization's constituents and community. Staff, volunteers, allies, funders, and others (depending on your situation this could include community leaders, media, or politicians), will be watching to see how the process unfolds, as will potential candidates. Below are some steps to take to ensure your organization presents its best, more organized and professional self.

1. Determine who is going to coordinate the search and hiring process

Appoint a someone to lead the overall process. It does not need to be the senior person in your organization or on the board. It should be someone with excellent organizational skills and the ability to commit enough time to see the process through. This person is often the chair of the search committee and serves as the 'hub' of the process, keeping all tasks on schedule and everyone in the loop. This person does not have to do everything associated with the search. Some of the organizational tasks can be delegated to another capable person, either another board or staff member.

Set up a search committee and clarify their mandate. This committee could be an existing board committee, or you could setup a new one. Because a hiring process can be time intensive, set your committee members up for success by ensuring that they are not overloaded with other duties.

Clarify the roles of other people in the search process. It is quite common for one or more senior staff members to sit on the search committee. The board will determine early on just what the staff person's role will be. For example, in some organizations the staff may be in an advisory role only and not be given the full voting privileges of board members.

The tasks of the search committee may include:

- Staffing the search committee
- Clarifying the committee mandate, roles, and responsibilities
- Clarifying the roles of other stakeholders (staff, current executive director, board)
- Developing a realistic search plan and schedule
- Confirming or clarifying the organization's strategic direction and needs
- Setting up a plan to make your search process as inclusive as possible
- Identifying your requirements for the new ED
- Assessing any desired changes to the current ED's role and the impact these changes may have on the rest of the organization
- Developing ED compensation and benefits recommendations for full board approval
- Determining the budget for the hiring process
- Conducting phone and in-person interviews
- Recommending finalists to the board for the final hiring decision

Regarding staff participation in the hiring process:

Staff offer a critical perspective; they also will eventually work for the new ED, so take special care to review any potential challenges and conflicts of interest with them before appointing them to the committee, as well as to provide clear separation of the search role from the person's everyday responsibilities.

It is critical for all staff to be kept informed and engaged by the board during the hiring process. Timely, clear, and (appropriately) transparent communication is a top priority; it will pay off in the future.

It is highly unusual for the outgoing executive director to sit on the search committee. However, if the board feels that the outgoing ED has knowledge and/or skills that are not transferrable, as well the capacity required to play a role in selecting their successor, then the board may choose to engage them. It is a very rare person who is able to play such a role.

The search committee typically manages the outreach process up to the point of recommending one or more final candidates to the full board, who will make the final decision. In some cases the board's executive committee may make the recommendations to the board after getting the input of the search committee.

2. Set the budget for the hiring process

In addition to the time required, publicizing the open position and evaluating potential candidates can be an expensive process.

The board should determine the cost of a search, including items such as:

- Advertising the position
- Use of an executive search firm, if desirable
- Staff time to process and track candidates
- Expenses for board members or applicants to travel to in-person interviews
- Moving expenses for the new executive director, if offered

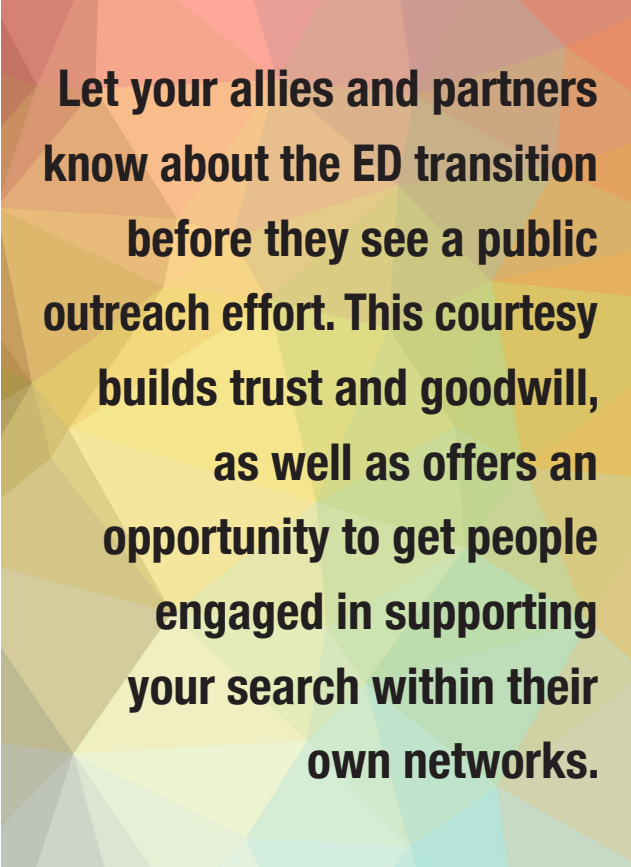
One or more staff members may be involved in logistical or support roles. Be sure that the expectations and roles are clearly articulated and communicated well in advance of the recommendations.

Develop a realistic timeline: Plan on the process of conducting a search and finalizing a hire to take at least three to six month process, if not longer.

If you are hiring a new executive director in absence of a current executive director, develop a plan to support critical functions of your organization for a six-month period. Work with senior staff to create a list of needs and guidance that they might require of the board.

Determine if you will use outside assistance in your search: On average, you can expect a search firm to charge around 20% of the annual gross salary of the position once a match is made. Search firms and consultants may have access to a broader pool of qualified candidates and can help provide support throughout the process. However, the use of a search firm does not always speed up the hiring process as the committee must educate them and work with them closely at each step along the way. This approach is most often used with larger organizations.

Despite these caveats, engaging a suitable search firm or search consultant can provide valuable guidance to some organizations. From facilitating initial scoping conversations, to identifying and developing job competencies to guiding the committee and board through the interviewing, referencing, and offering phases, a strong recruiter will ensure that your committee engages in a rigorous and efficient search process.



Let your allies and partners know about the ED transition before they see a public outreach effort. This courtesy builds trust and goodwill, as well as offers an opportunity to get people engaged in supporting your search within their own networks.

3. Fundraise to cover the costs of transition

Hiring a new executive director may be an opportunity to approach your most loyal funders and donors to explore their willingness to underwrite one or more of the following aspects of the search process:

- The cost of the search itself
- The cost of any additional compensation the outgoing ED will receive upon exiting
- Additional costs associated with covering key duties in the organization during the transition. For instance, it may be necessary to find additional funds to pay an interim executive director, or to cover the expense of keeping the outgoing ED on payroll at the same time that their replacement comes up to speed
- Any salary increases for staff due to the need for internal equity

In some situations a key funder may be highly supportive of the executive director transition. For instance, the funder may feel the current ED has reached a plateau, or more could be achieved with a new person in the role. In this situation, securing funding to support the transition may be more likely.

4. Develop job description and outreach package

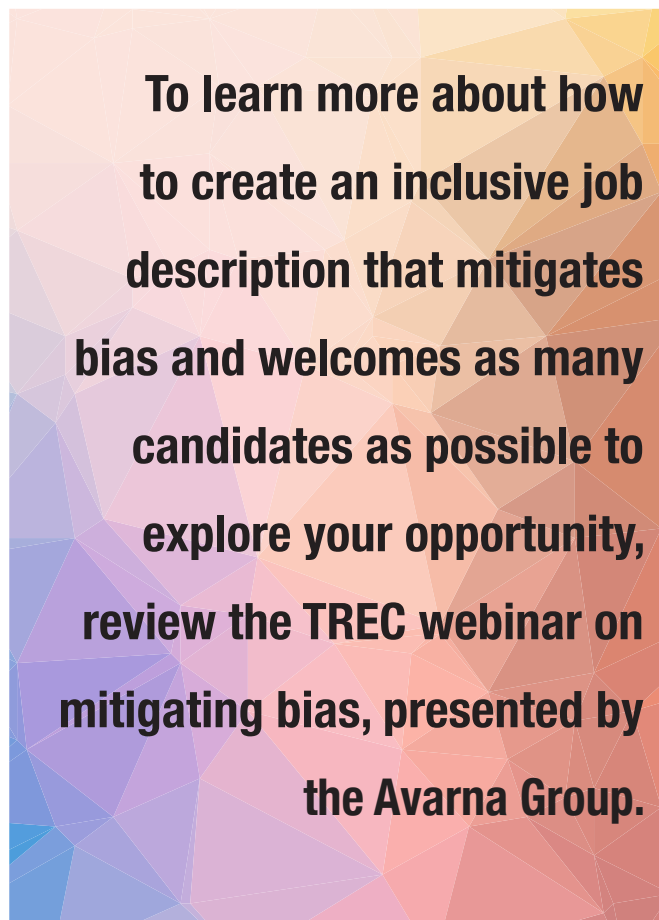
While undeniably challenging, hiring a new ED also offers your organization a tremendous opportunity to take stock of where you've been and where you want to go. What type of leadership and skillset would best support your organization to achieve its current goals? Is your organization needing a visionary? A highly skilled fundraiser? An experienced campaigner? A community-building organizer who knows how to build movement power? A combination of some or all of these skills? Take the time to answer these questions before developing your job description and beginning to network.

Job descriptions are the first interaction that many potential applicants may have with your organization. The words that you choose and skills that you list have a much more profound impact on potential candidates than many of us ever imagined.

Current practice is to list the salary range in the job posting, noting that it is negotiable if that is indeed the case. This change in practice increases transparency and equity, ensuring that all candidates are given the same information and that salaries are determined by skill and experience rather than past pay.

To learn more about how to create an inclusive job description that mitigates bias and welcomes as many candidates as possible to explore your opportunity, review the [TREC webinar on mitigating bias](#), presented by the Avarna Group and available on TREC's Resource Library at www.trec.org.

If you are inexperienced in writing job announcements, it's helpful to review TREC's job description sample and template, and job descriptions. If you do work with an outside hiring firm, they will provide this service. As you decide on the breadth and depth of your outreach methods, you may need to develop several



different job announcements to use for different audiences such as your current membership base or an online hiring site.

In addition to a job description, it is critical to provide additional materials to ensure that qualified prospective applicants are sufficiently knowledgeable about the organization. You can do this by developing an information packet that conveys the organization's programs, finances, strategic relationships, market position, and staff capacity. Balance the desire to present your organization in the best of lights with an honest assessment of current goals, challenges, and accomplishments.

Send the applicant outreach package in advance of your top candidate interviews. Due to the sensitive nature of some of the information, it may be advisable not to share everything with applicants at the beginning of the process. Some groups only provide more details as they are moving from phone interviews to in-person interviews. Typically, you can expect that even more information will be shared with your finalists.

All qualified candidates who pass an initial screening process should receive the same outreach package, which will include some or all of the following materials:

- Executive director job announcement
- Projected salary range - Current practice is to list the salary range in the job posting, noting that it is negotiable if that is indeed the case. This change in practice increases transparency and equity, ensuring that all candidates are given the same information and that salaries are determined by skill and experience rather than past pay.
- The organization's current strategic plan and annual report
- Marketing brochures and other promotional material
- List of your organization's staff and board members with their backgrounds
- Most recent audited financial statements and cash flow projections
- Budget for the current year, including a fundraising plan for projected revenue

Often, you may receive applications from within the environmental sector, or even from allied organizations. Confidentiality, as well as a very intentional practice around networking, are essential to protect anonymity and ensure that you are not perceived as 'poaching.'

5. Begin your search

It is common to consider hiring your new ED from within your current staff. The opportunity to have someone you know take the reins is very compelling, and creating opportunities for people to be promoted within an organization is empowering for them, as well as others.

Considerations when contemplating hiring from within:

- Looking internally immediately can shortcut the critical work of assessing what strengths and skills are most critical for your organization currently. It is incredibly tempting to turn to someone you know, and both you and they deserve the rigor that a fully formed hiring process affords.
- If the person applies and is not selected, they might choose to leave, and then you will be left with two presumably senior positions to fill.
- By continually looking within your organizations to hire senior leadership, we lose the opportunity to seek out and work with people from different fields and backgrounds who may have a new perspective to offer.

If there are people on staff who have the qualifications to be considered for the executive director position, follow the same hiring practices that you would for an outside candidate. It is important that all candidates are given fair and equal treatment in regards to access, qualifications, and interviews. In addition, assess the strengths the internal candidate brings — familiarity with programs, funders and the community. What will serve the organization best in the long term? All applicants should be interviewed using the same format (by phone, in-person, etc.), and should be assessed using an interviewing form or matrix.

6. Take steps to create an equitable and inclusive hiring process

There are some very straightforward steps that you can take to make your hiring process as inclusive and equitable as possible, as well as to appeal to a diverse pool of applicants. We encourage you to watch the TREC webinar on Mitigating Bias (www.trec.org) and download the toolkit.

One of the first steps is developing an interview record form, (a sample can be found on TREC's Resource Library,) so as to ensure that each candidate is asked the same questions and that their answers are evaluated similarly. Standardizing the interview processes helps ensure that applicants have the opportunity to answer the same questions, keeps the interviews focused on those questions rather than straying into causal conversation, and makes it possible to compare applicant's answers more fairly.

We encourage recruiting for your position in all of the traditional environmental venues as well as outside of the environmental sector. Not only can it be very valuable for your organization to gain new perspectives, it is critical for the environmental sector to diversify. Leaders from other nonprofit sectors, socially progressive business sectors, the community, foundations and government agencies can offer rich opportunities to expand the success and impact of the environmental sector.

It may be tempting to go just to your known circle of colleagues, advisors, staff, and donors when looking for new talent – resist! One important way for the conservation movement to become more diverse, inclusive, and equitable is to take the time to consciously work to ensure that job postings are not only shared beyond the usual conservation channels, but also welcoming to a diverse audience. Again, we recommend reviewing TREC's webinar that focuses on mitigating bias in recruiting and hiring.

7. Evaluate Prospective Candidates

In order to ensure a fair, equitable and inclusive hiring process that drives toward finding the candidate who best meets your needs, it's essential to assess each applicant using consistent standards which are tracked and measured across all candidates.

The following are the key steps in the hiring process:

- Screen applications. It's critical to use a process to ensure that your screening process is as unbiased and fair as possible. Suggestions include:
 - Aim to develop a hiring committee that is diverse across identities, backgrounds, and, if appropriate, skills
 - Have someone who is not on the committee remove all names, pronouns, and school affiliations from resumes before circulating them to the committee
- Designate a person to coordinate applicant screening. This person can be a staff, search committee, or board member. A good organizational system is a must, as is a checklist for evaluating each application against the stated job requirements. Use a hiring matrix to ensure each applicant is assessed using the same standards.

- ❑ As a rough guide, you can expect to eliminate up to 90% of applicants in your initial screening. You may want to keep their names on file in case other positions become available over the next year. It is not common practice to inform this potentially large group of people that they did not meet the position requirements. However, it is a courtesy that many appreciate and can build good will in your network.
- ❑ The most promising applications are then sent to the search committee for review. Designated members of the search committee should do the next screening, working towards a manageable number of well-qualified applicants, no more than 10-15, for phone interviews.
- ❑ Conduct phone or video interviews. Questions should be well constructed to reveal information about the candidate that is not readily apparent from their application. It is best to use a matrix and have each candidate answer the same questions, though the sequence may vary. It is also a good idea to practice the phone interview to ensure that each candidate is treated consistently. Interview all candidates using the same technology, whether it's by phone, video, or in-person.
- ❑ In addition to specific job skills, you will also want to think about any applicant's emotional intelligence and cultural awareness. Remember that while seeking candidates that feel 'like a natural fit' can seem comfortable, you lose a lot of opportunity to diversify your thinking and strategies when you seek out people who feel familiar or 'like one of us.' Relying on 'gut' when conducting a hiring process is not equitable or inclusive, robbing candidates of the opportunity to be judged fairly and your organization the opportunity to work with talented people.
- ❑ The objective of the phone interview is to identify the most highly qualified candidates for the in-person interviews. You should use the phone interview process to narrow down the candidate pool to no more than 3-5 people for the in-person interviews.
- ❑ Conduct in-person interviews. Conducting the in-person interview well is crucial to coming to a reliable hiring decision. Ideally, two or three people conduct these interviews. Having the same people conduct all interviews is more likely to result in a fair assessment of the candidate pool.
- ❑ As with the phone interview, it is best for those conducting the live interview to use a script of prepared questions and follows a matrix. This ensures that each candidate is treated equally and simplifies the decision-making process afterwards.
- ❑ It is useful to have the interviewers meet prior to each appointment to discuss the candidate, assign who will ask each question and settle other details. After each interview is complete, it is also a good idea to have the committee meet to discuss the candidate immediately, completing any notes and observations that will be useful in the final decision making process.
- ❑ Complete reference checks. Once your list of finalists has been determined, you will want to check each person's references. You can start with those provided by the candidate. Even though these references will tend to be positive about the candidate, you can still gain substantial information on how the candidate operates in various settings, getting a better sense of what they will be like in your organization.
- ❑ It is also recommended that you verify past employment history, and see that it matches what the candidate reports. Due to liability concerns, many organizations typically only verify basics such as job title and dates of employment. It may prove difficult to obtain information on the person's past rate of pay. While in the past employers often asked for an applicant's current rate of pay, that is no longer standard practice and is no longer legal in many states.

- You may be able to engage the reference in providing more information about your candidate's performance in their past organization, but this can also be a challenge to tease out. If the candidate is someone you are familiar with, you may be likely to get more valuable insight from your own network of personal references.
- Rank the final candidates. At this point, it should be clear who the most suitable applicants are. If the process has been well administered, any candidate who has done well in the in-person interview should be qualified to do the job. You will now be making fine distinctions in coming to a final choice. Your search committee may call a meeting with the entire board to present the finalists and initiate a dialog to rank them. This may lead to the need for additional interviews, perhaps with other board and staff members sitting in.

In order to make an offer, you need:

- ED job description
- A letter of hire specifying agreed-upon terms and conditions of the position
- Contract of employment, if one is used
- Specified performance standards and the organization's formal review process
- Clarity on the terms of the probationary period

The optimum outcome of this process is two or three final candidates, ranked in terms of board and staff preference determined by a clear set of qualifications for all candidates. For example, one candidate might have more experience with your issues, another might have more experience as an ED, another might have excellent fundraising connections. Clarifying your top priority skillsets and experience reduce the natural desire to select the candidate you *like* more or who feels most familiar. Getting to consensus when there is significant disagreement within the search committee or between the board and staff may not be easy. Disparate points of view among the board and staff must be aired and should be resolved at this point.

Even when a final candidate has been agreed upon, there is considerable work for the search committee to do.

You must negotiate with the potential ED about the following:

- Terms of hire
- Salary and benefits
- Start date
- Moving costs, if applicable

During the entire interview process it is important for the committee to keep the staff and board regularly updated on the status of the search, while also maintaining the anonymity of all applicants.

Complete the Hiring Process

Before making the final decision and before the final hiring recommendation to the board is made, it is advisable that all staff members have another opportunity to meet the final candidates. After all, it is staff that will have the most contact with the new executive director, so their assessment and level of comfort with candidates is of great value.

Your goal is to come to an agreement that constitutes a fair offer, one that works both for your organization and for the prospective executive director. Expect to spend time negotiating the specifics of this agreement so that as many details as possible are resolved to mutual satisfaction.

Be prepared to allow adequate time for the closing process. Both your organization and the candidate of choice will need time to make a decision. Encourage your candidate to think on the offer and resolve any lingering questions before making their decision.

Communicate the hiring decision

Until the new ED has been hired and the contract or agreement signed, do not announce the hiring. This confidentiality is respectful for all parties involved.

It's also best not to notify your other top candidates until you have a signed document from the lead candidate. But once you do, be sure that the other finalists have been informed before making a public announcement. It is a measure of respect and good will to have the runners-up hear this from you.

Once you have a signed agreement (letter of hire or contract), prepare an announcement to your constituents and community introducing the new executive director. Though the emphasis should be on the new ED, use this opportunity to acknowledge the outgoing person's contribution as well. Be sure to publicly thank anyone who has been part of the selection committee.

Clarify the role and transition plan for the departing executive director

The departing ED's knowledge and perspective can be invaluable to the incoming ED.

Consider formalizing how the outgoing ED will transfer information to their replacement. This may mean setting up a series of meetings, or an overlapping time of employment when the two can work together. Clarify your expectation of the departing ED in terms of leaving complete records and documentation for the new person.

Finally, make time to acknowledge, recognize, and celebrate the departing executive director.

Recognition and celebration are crucial in defining our organizational cultures – which includes acknowledging members of our community. Take time to thoughtfully acknowledge your outgoing ED in a style that befits them and the organization, whether it's in the form of written acknowledgements, a press release, a gift, or a celebration with staff, board, donors, funders, and community members.