



## Looking for Talent? Avoid These Common Pitfalls!

By Allison Falk

*Leadership transitions in organizations both large and small typically spark waves of panic, sending even logical managers into mad races to fill open positions as quickly as possible. Whether you are losing a beloved executive director or terminating a chief development officer, you can expect that these temporary gaps in leadership can leave an institution feeling debilitated. Yet, leadership transitions are also important natural catalysts for organizational change and advancement and, if orchestrated correctly, can help institutions reach new heights. During our more than 40 years of combined search experience, we have had many clients come to us with searches that have unfortunately collapsed due to very avoidable missteps or oversights. These blunders seriously and negatively impact morale and can lead to feelings of mistrust in organizational decision making, both internally in the staff and externally in the community.*

*While many of these pitfalls can sneak up on you right away, others can simmer beneath the surface benignly until they explode. Either way, most of them can be avoided with a little foresight and planning. The following are pitfall themes that we have identified, tools we have used to fix searches which have been brought to us already collapsed, and strategies we have used to help our clients avoid them in the future:*

### **Pitfall number one: Hiring in a Hurry.**

A leadership transition can provide an organization with an invaluable opportunity to step back and reflect on its current state and where it wants to be in one, five, and ten years. Unfortunately, the urgency of finding a replacement all too often overshadows this important time of reflection. Rather than hire for the future, organizations sometimes make the mistake of simply filling the shoes of the person who has just left.

To avoid this pitfall, we believe in the use of a strategic search roadmap. Even planned leadership transitions can be disruptive and a strategic search roadmap will ensure a comprehensive process, bringing everyone onboard to think about the organization's future. Developing a strategic search roadmap starts with an organization asking itself where it wants to be, what it needs to get there, and what obstacles stand in its way. With this information it is easier to next identify real qualities and skills needed in the new hire to support the organization through the challenges and obstacles that have been identified. The result is a deeper understanding of who it is you are seeking and a more strategic sense of what that individual will need to address once hired. This helps make everything from the search outreach to the interview process more strategic, productive, and meaningful and is often the difference between making a "good" versus a "transformational" hire.

### **Pitfall number two: Looking Through the Rosy Lens.**

No institution looks forward to public recants of its own shortcomings, but in a search you are likely going to hear exactly what the market thinks of your organization and its willingness to work for you. It is a significant mistake to neglect the opportunity to critically assess the challenges and obstacles you could encounter in recruiting, such as a negative image in the marketplace, a leader's reputation for micromanaging, persistent rumors surrounding a past financial crisis, or a public history of high turnover. It is natural to want to hide the "dirty laundry", but thinking about it at the outset of the search will help you to be more strategic about the messages you send in the outreach and/or to deal with negative feedback you receive in a more productive way.

Another 'rosy lens' challenge organizations face is assuming that candidates are falling over themselves to come work for their organization. While the position and the opportunity may indeed be very attractive there are real risks that good candidates take in submitting themselves to a search process. A savvy organization will anticipate this challenge and be sensitive to the mutual courtship that is required in finding and recruiting the best of the best.

Overall the best tool for avoiding the 'rosy lens' is a private, but highly critical assessment of the challenges for the position and potentially negative perceptions of your organization in the marketplace. Ignoring market



perception will ultimately lead to a weak candidate pool. Being realistic about your challenges and using that awareness throughout the search to develop positive materials that can help mitigate real or perceived flaws and to help navigate your side of the courtship will help you find and attract candidates who are motivated by the real issues they will face if hired and not the rosy nirvana you wish were there.

### **Pitfall number three: Teasing the Bridesmaid.**

Internal candidates can pop up at any time in the search process and create some of the most interruptive hiccups along the way. Internal candidates are often strong in many areas, but have less experience in others which are equally critical to search committee deliberations. Some organizations interview internal candidates out of fear of losing them to advancement opportunities elsewhere, while others interview them merely out of courtesy.

The rule here is simple. Do not encourage a non-viable internal candidate to apply. There can be an exception when an internal candidate makes his or her application intentions known before you can intervene or when the politics of the situation demand the consideration of a particular candidate before you can assess his or her viability, but for the most part it is best to avoid the consideration of a non-viable candidate altogether. Putting a nonviable candidate through a competitive process can be embarrassing for an internal candidate and can deliver a fatal morale blow to other staff eagerly watching the process. The best tool for avoiding this pitfall is a series of open communications at the launch of the search about the qualities sought in the new leader. If the internal candidate is not qualified for the position, the effective development of a position description should make that case for you and will point out skill or experience gaps that have nothing to do with their allegiance to the organization. Using this tool enables you to spend more constructive time talking with prospective internal candidates about areas of development so that they can grow and possibly be ready for the next leadership opportunity.

On the other hand, if the internal candidate is qualified, s/he should be considered a contender and should be a part of the same process as external candidates. One of the most common questions from potential external applicants in a leadership search is “Are there any internal candidates?” The common fear is that the external process is just a ‘front operation’, when the real decision to hire internally has already been made. In order to mitigate anxiety about internal candidates it is critically important to create an even and fair playing field. The perception that an internal candidate was brought through a different process is not appealing and will complicate your ability to attract talented candidates in future searches, regardless of who is ultimately hired. However, giving internal candidates an opportunity to make the case will allow them to better understand where they shine and/or need additional polishing. A well-run process for viable internal candidates demonstrates that the search committee is backing advancement and growth within the organization and may even lead to the discovery that an internal candidate outshines all of the external candidates. In any case, a fairly run process that is honest with internal candidates is more likely to lead to a search resolution that will inspire and ignite energy at every level of your organization.

### **Pitfall number four: Submitting to Staff.**

Trustees and staff members have different roles within an organization. It should be expected that they will also use different lenses when evaluating candidates. Because of this, it is not uncommon that these parties may disagree about who should be hired, but when staff expects the right to trump decisions the ensuing conflicts can derail the search.

Consider a staff member’s point of view. Change is scary, and if you are looking for a new leader who will “shake things up” then the odds are that this change could be even scarier. While it is inappropriate, in most cases, to have staff members choose their next boss, finding an appropriate role for them to play will ease the transition of the new hire and make life a little easier for everyone.

There are several tools for giving staff members an appropriate voice in the search process. Including staff in the early search strategy discussions, the development of the position profile, and the initial outreach process are good ways to engage staff ideas and concerns in a constructive way. Ongoing check-ins and regular



communication to staff about the general progress of the search is also an empowering tool and often times will placate staff members who feel out of the loop. If your new hire will be responsible for initiating significant changes, you might consider retaining a consultant to work with the staff around these new goals. This will pave the way for change to occur once the finalist is onboard and it sends a strong message to candidates that the institution is committed to these changes and has invested initial resources to pave the way for the new hire. Finally, selecting one or two trusted staff leaders to join a search committee can be a good way to ensure the staff voices are represented throughout the process while also ensuring someone on the staff understands the reason behind potentially unpopular decisions. The staff representative selection should be taken seriously, however, as individuals who are known to bring too much emotion to decision making or to play politics within the organization can do more damage than good in the sensitive process of recruiting a new leader.

### **Pitfall number five: Distinguishing References from Rumors.**

Once you reach the reference checking stage, it's natural to have biases about the finalists and a desire to learn as much as you can as quickly as your sources will allow. Yet, it is here that the line between uncovering the truth and digging for dirt is easily blurred and search processes become dangerous for organizations. References are extremely tricky and can both confirm what you love about a candidate and dredge up your worst fears. When conducted haphazardly, they have the power to sink the chances of the right candidate being hired.

There is a sensitive art to conducting references that paint a clear and accurate picture of a candidate's strengths and weaknesses. Most references begin with on-list individuals given to you by the candidate. However, many organizations smartly look for ways to go off-list or, in other words, to talk with people not offered by the candidate who may be able to speak to the candidate's strengths and weaknesses. However, off-list references done by even the most well-meaning committee members can be toxic. When you start Googling or casually checking around with friends of friends about a candidate, you can often uncover unbalanced or unsubstantiated anecdotal opinions that have the potential to destroy reputations and endanger successful searches. Moreover, encouraging a nasty rumor-mill can lead to actionable offenses and land you uncomfortably in a court of law. Remember, even successful people have critics and/or mistakes in their pasts and that's not necessarily a bad thing if they are handled effectively.

The first step to avoiding the pitfalls of sensitive referencing is to handle both the on-list and the off-list calls in an open, ethical way. First, start with on-list references. This gives you a base-line understanding of the challenges a candidate has faced. Second before going off-list, alert the candidates that you are about to do this so they know in advance that their confidentiality can no longer be guaranteed and so they have an opportunity to tell you about anyone they do NOT want for you to call and why. This enables you and the candidates to have an open and honest conversation about personality conflicts or unpopular decisions that may have come up in the past. Second, consider the source; when you receive a negative reference on an otherwise good candidate, do not stop there. Instead, surround the issue by referencing the reference with a third party so that you can better understand the relationship the candidate and the reference had and correctly identify who is the source of the problem. This protects both your investment in the process to date and the candidate who may be unwittingly at the wrong end of a misunderstanding or unfair bias. Finally, if you receive negative feedback on a candidate, keep in mind that most of us have made mistakes in our careers, so it's important to probe carefully into how the candidate may have grown since the actual error.

### **Pitfall number six: Spilling the Beans.**

One innocent comment about a prospective candidate to a colleague who is not on your search committee, or an application left carelessly in the copier room can ignite an irreparable firestorm, causing months of hard work in a search to come crashing down in a split-second. We have seen breaches of confidentiality not only cause pools of excellent candidates to remove their names from consideration in a search but also cause long lasting ripple effects that complicate an organization's ability to conduct effective future searches. Because of this, we cannot overemphasize the importance of confidentiality when working with a search committee, especially when it is a large group.



To avoid this pitfall, there are several tools we recommend for committees. First, requiring everyone to sign a confidentiality agreement at the start of the search and again at the interview phase is one way to hold people accountable for their actions and to remind all involved of the responsibility to maintain confidentiality. Second, passing out materials at each meeting and then collecting them again at the end of each meeting is a way to avoid the careless 'leave-behinds' that can often lead to destructive breaches of confidentiality. Finally, there is the old-fashioned scare-them-straight method of communicating at the beginning of each meeting how disastrous these breaches can be to the search, to their individual reputations, and to the reputation of the organization.

### **Pitfall number seven: Expecting Sacrifice.**

Does your bank take 'Good Karma' in exchange for mortgage payments? No? Neither does ours, and neither will your hire's. Few things are more uncomfortable than haggling over money, but pushing this subject under the rug until the last hour will only make matters worse. We often hear sharply unrealistic sentiments from our clients such as, "Once they see how compelling this opportunity is they'll be willing to take a pay cut" or "If the candidate cares about compensation then they are not mission-focused enough for our organization" or even "In this economy they're lucky to get even this salary." None are true; all are insulting and highly damaging to the sensitive art of negotiating a fair offer with your chosen candidate.

The tenor of the negotiation will color your entire relationship with your new hire. Poorly handled negotiations destroy the honeymoon phase, immediately handicapping your new hire's ability to perform to the best of their abilities and to the height of your expectations. Rather than letting this happen, address expectations around compensation at the beginning, middle, and end of the search so that the institution has time to get creative about additional ways to adjust an offer if necessary. If the budget of your organization does not allow you to match or exceed what the candidate is earning, that should be discussed long before you get to the offer stage and the offer should then honestly reflect what you are able to 'stretch to' as well as opportunities for revisiting salary if the performance of the hire helps bolster the finances of the organization.

### **Going It Alone or Getting Help.**

In summary, there is an art and a science to a well-run search. Identifying these pitfalls is the science; avoiding them is the art. Organizations mindful of these pitfalls should be well-positioned to engage in dynamic, fruitful search processes, but should also be wary of other dangers always lurking around the corner. Before rushing ahead into pitfall number one for your next hire, we strongly encourage you to spend some time thinking about your organization, your needs, your capacity, and whether you could use some help avoiding the pitfalls lurking ahead.

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