



Presidential Search Process for Higher Education

By Bruce Dingman

With the involvement of our search firm we estimate that 90-95% of the work will be done by us and 5-10% by the Search Committee, yet the Search Committee will control who is a candidate and who is not. The search process will include the following steps:

- **Defining the Position and Need**...the recruiter will meet with the Search Committee to determine what is needed in the position and help develop a consensus as to what the search firm will be looking for in a candidate. There should be agreement within the Search Committee at the initiation of the search process as to a candidate's "must-haves," "nice-to-haves" and "should-not-haves" in experience, management style, values, education, and spiritual faith (if applicable), plus an understanding of the position and what the implications involved in coming to the institution and living in the area may mean for the right person
- **Gathering Information and Building Support for the Search Process**...the recruiter should spend time on campus meeting individually and in groups with those who want to contribute as to what the characteristics and experience should be, to answer questions about the search and selection process and to gather an understanding of various perspectives. This might include board members, deans, faculty, staff and students.
- **Creating a Marketing Tool for Describing The Opportunity**...with the Search Committee's approval the recruiter will create and submit an "Opportunity Profile" to create a strong interest describing the university, the position and the "must-haves," "like-to-haves," "should-not-haves" and the locale.
- **Creation of the Marketing Plan**...the recruiter will create a strategy as to where the candidates are likely to be found and various ways to reach them using both proactive and reactive methods. This will include networking with faculty, staff and administrators at the institution and other colleges or universities to find prospective candidates.
- **Execution of the Marketing Plan**...the search firm then executes the marketing plan, contacting hundreds of sources and prospective candidates. The process is done in a candidate friendly manner, rather than a "send resume, references and salary by such-and-such a date" style.
- **Preliminary Screening of Applicants**...preliminary screening by telephone of the most likely candidates comprises a continually updated list of "Names Considered" which is given to the Chairman of the Search Committee on an every other week basis with the categories of "Prime Candidates," "Possible Candidates" and "No Longer Under Consideration." The recruiter will advise the Chairman as to why someone should or

should not be in a category but the Chairman (and therefore the Search Committee) controls the status of all people considered.

- **Reference Checking**...the search firm will, with the utmost discretion, do thorough reference checking to develop an understanding of the person's career path, philosophy of higher education, accomplishments, personality, management style, values and fit with the job. References will be checked, as confidentiality permits, in a 360 degree fashion, of superiors, close peers and subordinates. The recruiter will interview all candidates given serious consideration in person, with the probable number being 10-15 in order to winnow those down to the optimal four candidates.
- **Prepare a Candidate Profile**...the recruiter will finish reference checking and background checks (credit, criminal and driving checks, done with the person's permission) and prepare a Candidate Profile which includes the resume, educational background (degrees having been verified), and results of interviews and reference checking. The Search Committee members will receive the Candidate Profiles before interviewing the candidates and if the committee wishes. With the Chairman's approval, committee members may be assigned or authorized to check additional references beyond those done by the recruiter to confirm or enlarge the understanding of the candidates. In such situations, care should be taken to not jeopardize the confidentiality of the candidate.
- **Search Committee Interviews the Candidates**...over a two-day period the Search Committee will have a formal 2-2 ½ hour interview and an informal interview over a meal with each candidate. Then the Search Committee caucuses to separate the "keepers" from the "non-keepers" and ultimately selecting the preferred candidate or candidates.
- **Second Round of Interviews**...then the preferred candidate (or candidates) with his or her spouse returns to campus for a second round of interviews, providing an opportunity to meet with those who will be peers and direct reports, a meeting with the incumbent, and a time to check on houses, schools, etc. The Chairman of the Search Committee and the Chairman of the Board of Trustees will hopefully also have dinner with the candidate and spouse.
- **Collecting the Opinions**...the Chairman of the Search Committee will ask all those who met with the preferred candidate on the second trip for their impressions, and assuming nothing negative of major consequence became apparent, the Search Committee recommends the person to the Board of Trustees for affirmation.
- **The Board's Selection**...the board discusses the search process, the top candidate, the compensation package needed and votes to make a job offer to the person.
- **Acceptance**...the Chairman makes the job offer and asks for a response within a relatively sort time frame. The recruiter then checks with the candidate to sense the reaction to the offer and if needed acts as an informal intermediary to help both sides come to an amicable agreement. The offer is now accepted.

- **Integration of the Candidate to the Organization and Family with the Community...**with the person hired and on board, the Chairman of the Board will plan how best to introduce and integrate the person into the organization. If possible something similar has also been done to introduce the spouse and family to the community.
- **A year later...**if the Chairman and the new President both feel “things are going well and there have been no surprises” then the search process was completed successfully.