SAWA Tracks to Success

Animal Welfare CEO Onboarding:
Achieving Traction in the First 100 Days

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Introduction

Congratulations on your new role in an animal welfare organization! As a resource from the Society of Animal Welfare Administrators (SAWA), *SAWA Tracks to Success* is intended to be a useful tool to assist you become successful in your new role of president, chief executive officer or executive director. *SAWA Tracks to Success* is another example of how SAWA serves as an important resource to advocate humane ideals through professional advancement of its members.

The goal of *SAWA Tracks to Success* is to help new executives gain traction during the all-important onboarding period within an animal welfare organization. It is meant to be used as a workbook, providing guidance and suggestions via important milestones along the sometimes challenging road of the first 100 days. Not every item or task will be relevant to you, based on your unique personal and professional experience. To account for individual differences and needs, the milestone tracking workbook includes seven "tracks" of learning to assist in providing focus in the areas of greatest need. References to resources, helpful links and other forms of assistance are provided in the appendix.

When reviewing this resource, there are some important concepts to consider: First, this resource assumes that the critical first days, weeks and months should ideally begin well before the animal welfare executive's first day. In fact, we believe you should consider planning for the onboarding process as early as sixty days prior to beginning with your new organization; Second, for busy executives who may have difficulty finding extra time to begin the onboarding process early, this resource includes a suggested "soft start" during which you can read, learn and absorb as much as possible about the new organization before beginning day 1; Finally, we believe the most successful onboarding transitions include support from the Board of Trustees. In the appendix, we have included a Board Checklist of items and actions that may ease the transition for the new animal welfare executive.

This resource is a "living document" that will change and be updated as new methods evolve, additional activities are defined and as more executives provide feedback pertaining to their onboarding process and their experience with this tool.
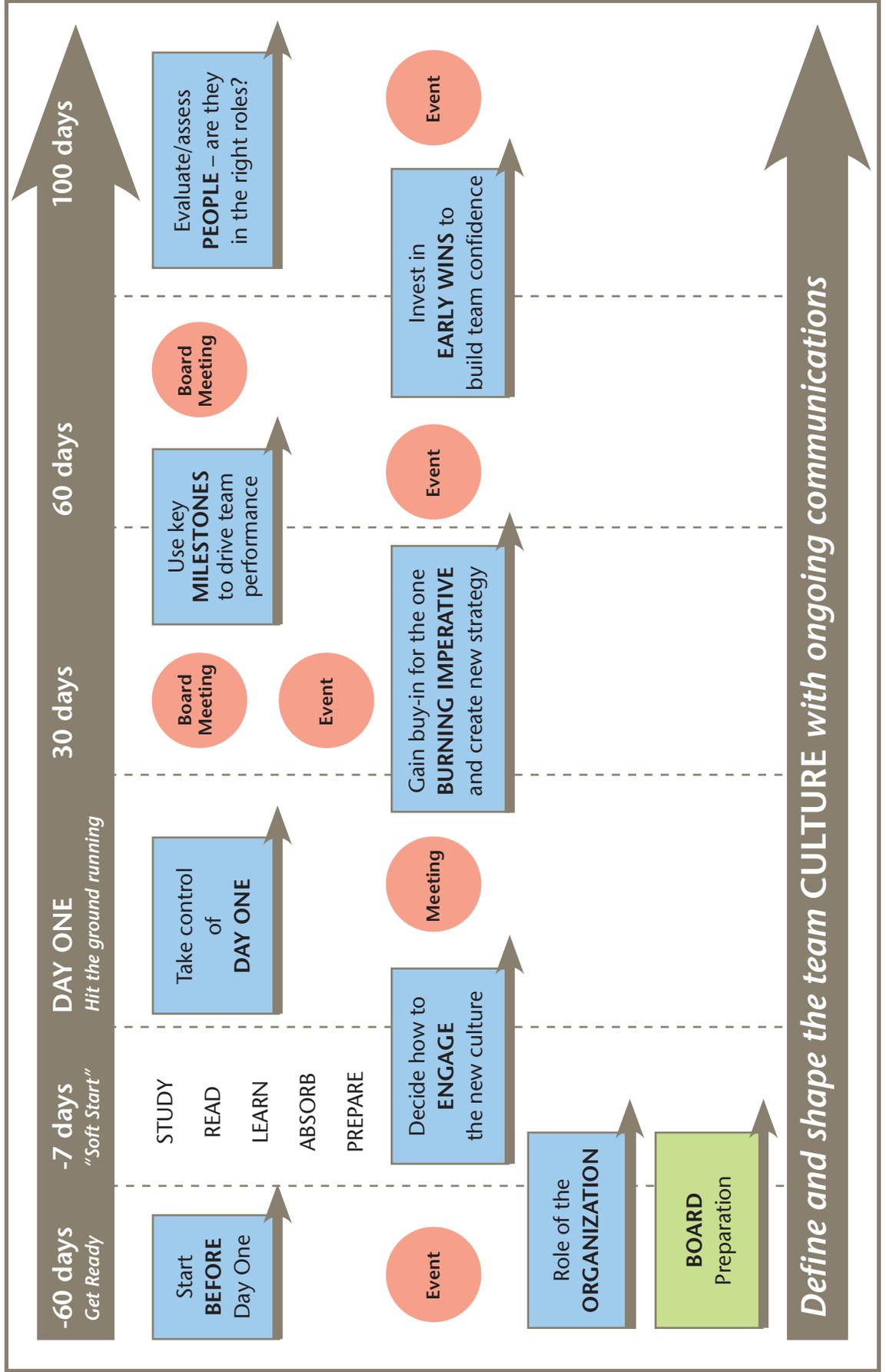
Special thanks to the animal welfare executives, SAWA members and other professionals, led by Michael Baehr, former VP, Communications and Community Engagement, San Diego Humane Society and SPCA, who assisted in the compilation, design and publishing of what we hope is a very useful onboarding tool.

Maurine Dyer Stevens
President & CEO, SAWA

Diagram 1

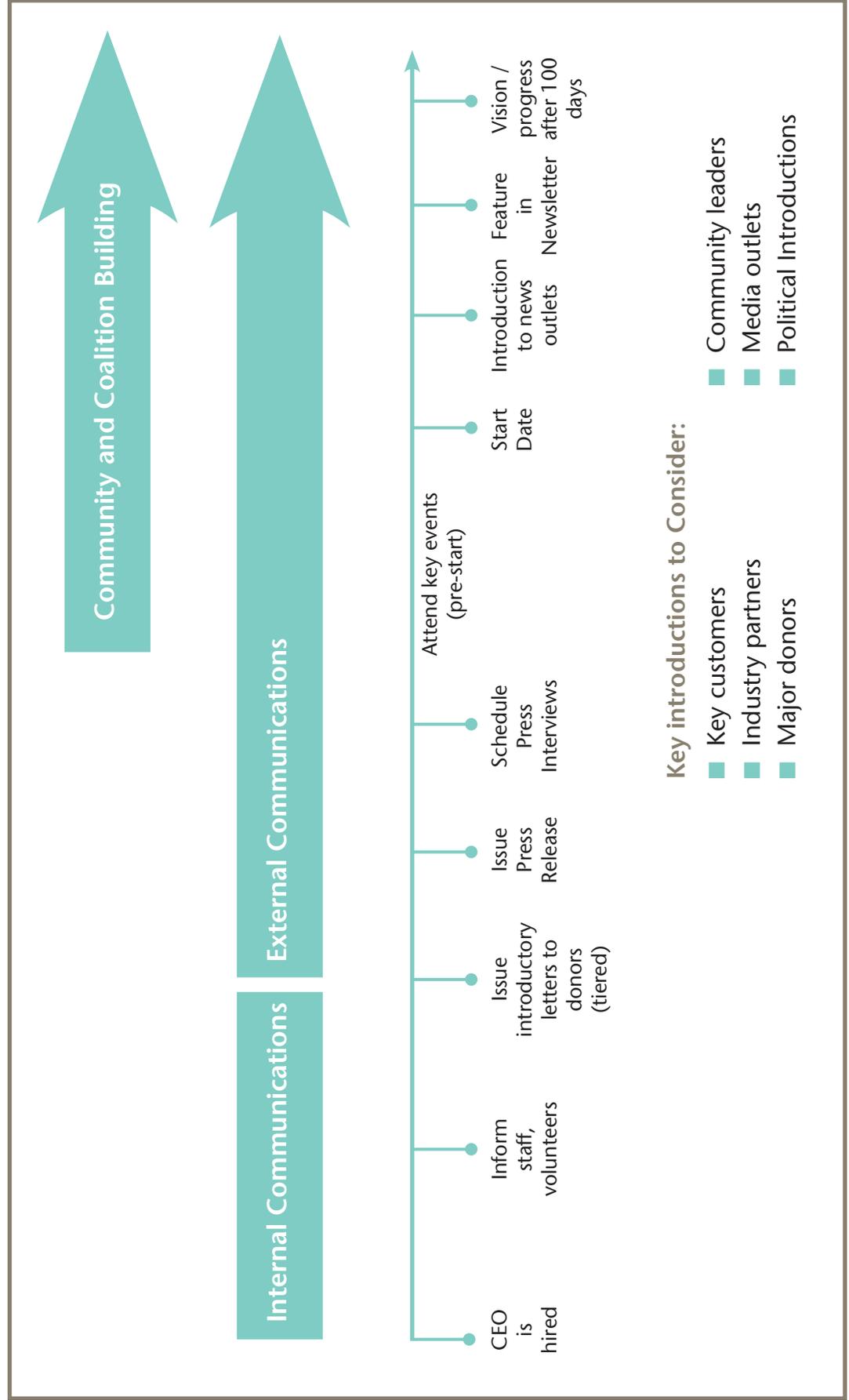*Planning Horizon for The New Animal Welfare Executive*

In thinking about the 'big picture' of an animal welfare executive's all-important first 100 days, it may be helpful to visualize the onboarding horizon and the various key events and milestone stages in the process. Of course, every organization and every hiring situation is unique, but this visual map may be helpful in navigating through the tasks and activities that lie ahead. Milestone activities are presented in the square boxes, while key events and important activities will occur intermittently as indicated in the circles.

-60 days *Get Ready*	-7 days *"Soft Start"*	DAY ONE *Hit the ground running*	30 days	60 days	100 days

Start **BEFORE** Day One

STUDY
READ
LEARN
ABSORB
PREPARE

Take control of **DAY ONE**

Use key **MILESTONES** to drive team performance

Evaluate/assess **PEOPLE** – are they in the right roles?

Decide how to **ENGAGE** the new culture

Gain buy-in for the one **BURNING IMPERATIVE** and create new strategy

Invest in **EARLY WINS** to build team confidence

Role of the **ORGANIZATION**

BOARD Preparation

Event *Meeting* *Board Meeting* *Event* *Board Meeting* *Event* *Event*

Define and shape the team CULTURE with ongoing communications

Diagram 2
Example of Onboarding Timeline

Strategic Communications: Preparing to Announce the New Executive

This diagram provides a visual example of how an organization may view the preparation and communication process for announcing a new animal welfare executive. The communication may occur in two distinct "phases": internal communications/preparation and external communications. The goal is to have a well-coordinated communication plan that informs key stakeholders while managing the important message(s) and building community and coalition support.

Community and Coalition Building

Internal Communications   **External Communications**

- CEO is hired
- Inform staff, volunteers
- Issue introductory letters to donors (tiered)
- Issue Press Release
- Schedule Press Interviews
- Attend key events (pre-start)
- Start Date
- Introduction to news outlets
- Feature in news outlets
- Newsletter
- Vision / progress after 100 days

Key introductions to Consider:

- Key customers
- Industry partners
- Major donors
- Community leaders
- Media outlets
- Political Introductions

Seven Tracks to Success

Learning Tracks – What They Are and How To Use Them

Topics have been organized into unique 'tracks' of learning to assist in focusing one's attention during the onboarding process. Each track represents a unique area that may or may not apply to each person based on that individual's particular skills, experience or interest.

1   Agency Operations

- Understand job-specific requirements

2   Leadership & Staff

- Absorb the organizational chart and discover/assess capabilities
- Get a pulse on internal culture

3   Customer

- Understand key customers' needs and related issues, nuances or sensitivities

4   Professional & Industry

- Determine training or skills needed
- Gain industry knowledge pertinent for the new position.

5   Board Relationship

- Establish expectations and communication for success

6   Community affiliations

- Establish relationships with key community coalitions and groups
- Understand community expectations

7   Development/Donor Relations

- Identify key donors and donor imperatives
- Create an organized, methodical introduction to the donor community
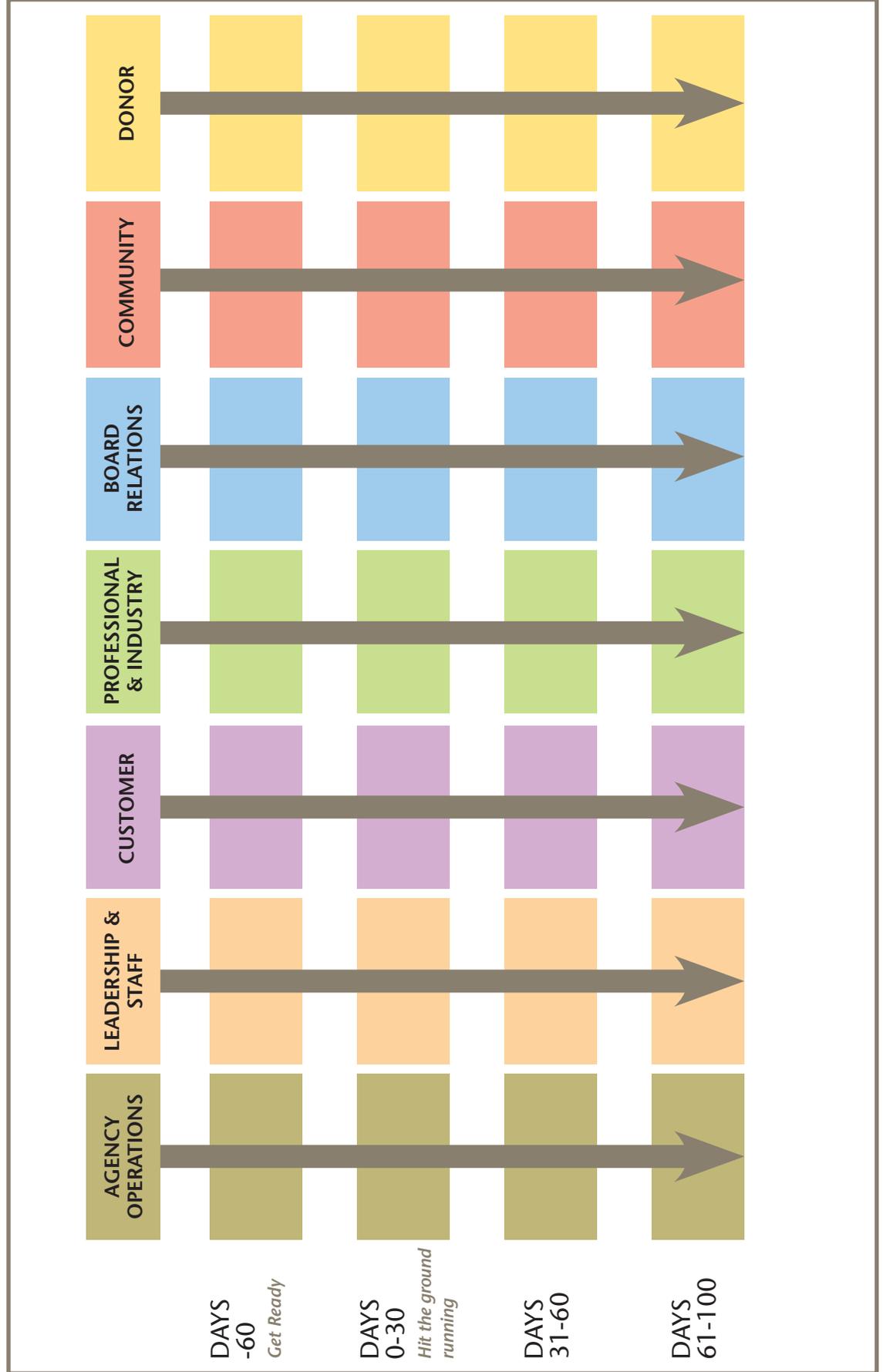
TIP: *Set a 30 minute calendar appointment for yourself every Friday to check your progress across each learning track.*

Learning Tracks
A Visual Example

The *SAWA Tracks to Success* are just that – "tracks" of information organized by topic. This diagram provides an overview of each track included in this workbook, and demonstrates how an animal welfare executive may systematically progress from one topic to the next in order of time spent in the new role.

	DONOR	COMMUNITY	BOARD RELATIONS	PROFESSIONAL & INDUSTRY	CUSTOMER	LEADERSHIP & STAFF	AGENCY OPERATIONS
DAYS -60 *Get Ready*							
DAYS 0-30 *Hit the ground running*							
DAYS 31-60							
DAYS 61-100							

Learning Tracks – *Milestone Tracking Workbook*

AGENCY OPERATIONS: Making a Plan and Understanding How Everything Works

DAYS -60
Get Ready

- ☐ Begin 100-day draft plan of approach
- ☐ Review organizational documents (bylaws, etc.)
- ☐ Outline communications priorities
- ☐ Develop calendar of key events/introductions
- ☐ Understand board expectations of first 100 days
- ☐ Establish introduction plan by board president
- ☐ Review prior year's board minutes and operational reports

DAYS 0-30
Hit the Ground Running

- ☐ Schedule organization site tours
- ☐ Assess accuracy & stability of financial systems & reports
- ☐ Send introduction to key stakeholders
- ☐ Begin to meet key donors
- ☐ Meet leaders of local animal welfare organizations
- ☐ Review personal plan and revise as needed

DAYS 31-60

- ☐ Establish communication routine
- ☐ Identify relevance of established key metrics
- ☐ Identify infrastructure needs (IT, phones, equip, etc.)
- ☐ Review facility history, issue list & maintenance needs
- ☐ Meet key community leaders
- ☐ Understand history of community collaboration
- ☐ Obtain schedule of all board committee meetings; attend as many as possible in first 100 days
- ☐ Review personal plan and revise as needed

DAYS 61-100

- ☐ Develop strategy to address infrastructure gaps
- ☐ Update key metrics if needed
- ☐ Establish goals for key metrics
- ☐ Review personal plan and revise as needed

Learning Tracks – *Milestone Tracking Workbook*

LEADERSHIP & STAFF: Learn the Organization and Culture

DAYS-60
Get Ready

- ☐ Review organizational chart
- ☐ Identify mission, vision and values
- ☐ Gather communication/newsletter samples
- ☐ Research recent (last two years) organization media coverage
- ☐ Clarify board expectations of your role and first 100 days
- ☐ Facilitate office work space and technology to be operational immediately
- ☐ Gain access to internal email communications stream; begin to understand how staff communicate in the organization, how decisions are made, etc.

DAYS 0-30
Hit the Ground Running

- ☐ Schedule one-on-one meetings with each board member
- ☐ Review employee files of direct reports
- ☐ Hold first all-staff meeting and establish staff meeting schedule
- ☐ Establish senior management meeting routine
- ☐ Consider surveying staff/volunteers to understand needs, roles, history/issues, capabilities
- ☐ Schedule time to work in each department
- ☐ Get introduced to/familiar with animal management software
- ☐ Review board committee meeting structure and minutes
- ☐ Review documentation or solicit feedback regarding teamwork, morale, stress levels, fatigue
- ☐ Schedule time to attend department meetings

DAYS 31-60

- ☐ Conduct interviews with staff and key volunteers; understand history/current issues
- ☐ Set up personal meetings with individual key staff, learn their role, organizational perspective and develop rapport
- ☐ Work side-by-side with staff in each department
- ☐ Determine best volunteer engagement venue (group meeting, 1:1's etc.)
- ☐ Has a Shelter Diagnostics Survey (SDS) been completed? If not, consider conducting one
- ☐ Assess Strategic Operating Plans
- ☐ Meet multiple volunteers

DAYS 61-100

- ☐ Assess management team knowledge of organization' financial state
- ☐ Assess HR function and related compliance
- ☐ Gain understanding of training efforts and employee development plans
- ☐ Establish trusted advisors (internal)
- ☐ Assess applicability of SAWA membership for your senior staff and/or area leaders

Learning Tracks – *Milestone Tracking Workbook*

CUSTOMER: Understand the Customer & Customer Data

DAYS-60 Get Ready

- ☐ Obtain and review shelter intake data; assess areas of service coverage most at-risk
- ☐ Consider geographic tracking options (data by census tract rather than zip code)
- ☐ Obtain and review organization program/service-users data; identify large users or support for programs
- ☐ Compare identified at-risk areas (high intake of animals) with service-user areas (high numbers of clients using programs/services)
- ☐ Identify through census track data potential "program impediments" in high risk areas
- ☐ Identify other organizations or sources for adoptable animals; assess "adopter" overlaps or gaps
- ☐ Work with operations and communications/marketing officers to assess needed modifications

DAYS 0-30 Hit the Ground Running

- ☐ In conjunction with adoption manager, assess adoption process modification needs; review comments of visitors that didn't adopt
- ☐ Identify and develop dialogue with prominent community leaders and elected officials in at-risk areas; discuss data, solicit support, and gain endorsement of program/services information disseminateion to increase participation by constituents in programs/services
- ☐ Review adoption promotion materials; consider outlets for demographic or cultural deficiencies or both (i.e., language/technology barriers)

DAYS 31-60

- ☐ Meet with key staff stakeholders in service/program areas most impacted by at-risk areas (i.e., admissions/intake staff; animal control officers; spay/neuter program staff; outreach staff); present data; solicit input on program modifications
- ☐ Meet with community organizations providing similar programs; discuss collaboration: share data, target at-risk communities
- ☐ Meet with community organizations providing adoption services (i.e., other shelters, rescue groups, etc.); discuss joint or simultaneous adoption events (i.e., Adopt a Cat month, Adopt a Dog Month, Small Mammal/Pocket Pet Adoption Weekends, etc.)
- ☐ Test adoption process modifications; consider use of "secret shopper/adopter"

DAYS 61-100

- ☐ In conjunction with key staff, develop modifications to programs/services to better reach at-risk communities
- ☐ In conjunction with community leaders/elected officials, develop timeline for launching newly modified programs/services to greatest at-risk communities
- ☐ Continue collaborative discussions with stakeholder organizations
- ☐ Monitor data regarding increased usage of spay/neuter services, decreased animal intake from at-risk areas

Learning Tracks – *Milestone Tracking Workbook*

INDUSTRY AND PROFESSIONAL: Animal Welfare Industry and Special Skills

DAYS-60 Get Ready

- ☐ Read section "SAWA as a Resource" (page 16)
- ☐ Contact local state humane association and review current/pending/recent animal legislation
- ☐ Order copy of state's animal law handbook
- ☐ Understand Asilomar Accords and shelter's statistics/compliance
- ☐ Understand open, managed and closed admission models

DAYS 0-30 Hit the Ground Running

- ☐ Review agency plan for PR issues around euthanasia
- ☐ Notify SAWA of your new role and contact details
- ☐ Contact local county animal control agency or humane society; make introductions, gather statistics
- ☐ Sign up for SAWA Listserv, email, newsletters from national organizations
- ☐ Research and join professional organizations

DAYS 31-60

- ☐ Look ahead to industry conferences you may wish to attend
- ☐ Consider any needed professional development
- ☐ Gain and review "trending reports" for the industry as a whole

DAYS 61-100

- ☐ Consider becoming a Certified Animal Welfare Adminsitrator
- ☐ Target experts to mentor your success
- ☐ Tour local shelters whenever possible when traveling
- ☐ Understand roles of national organizations
- ☐ Consider becoming a Certified Animal Welfare Administrator through SAWA (see SAWAnetwork.org)

Learning Tracks – *Milestone Tracking Workbook*

BOARD : Establishing Relatinships for Success

DAYS-60
Get Ready

- ☐ Understand board expectations of your first 100 days
- ☐ Establish how and when you will be introduced by the board president
- ☐ Review board handbook, and prior year's committee and board minutes
- ☐ Begin 1:1 meetings with individual board members - in person if possible
- ☐ Read by-laws, strategic plan, org. mission, goals, code of ethics, annnual reports for past 2 yrs
- ☐ Review finanical audit, current year budget and all pertinent finacial reports and contracts

DAYS 0-30
Hit the Ground Running

- ☐ Establish communication routine with board president
- ☐ Establish communication routine with full board
- ☐ Prepare for first board meeting
- ☐ Obtain schedule of all board committee meetings; attend as many as possible in first 100 days
- ☐ Review board committee meeting structure and minutes for past two years
- ☐ Continue 1:1 meets with individual board members, in person if possible
- ☐ Read board self assessment

DAYS 31-60

- ☐ Continue 1:1 meets with individual board members
- ☐ Clarify board expectations of your role and first 100 days
- ☐ Obtain or develop tool to report progress on the strategic plan
- ☐ Study matrix of board make-up and terms
- ☐ Gain a copy of all contracts
- ☐ Consider becoming a Certified Animal Welfare Adminsitrator
- ☐ Target experts to mentor your success
- ☐ Tour local shelters whenever possible when traveling
- ☐ Understand roles of national organizations
- ☐ Consider becoming a Certified Animal Welfare Administrator through SAWA (see SAWAnetwork.org)

DAYS 61-100

- ☐ Develop plan for first year
- ☐ Clarify board expectations for your first year

Learning Tracks – *Milestone Tracking Workbook*

COMMUNITY: Community Organizations, Coalitions and Other Groups

DAYS-60
Get Ready

- ☐ Collect and review demographics of organization's service area (population, income, etc.)
- ☐ Request staff or board prepare list of service groups in the community (Rotary, Kiwanis, etc.)
- ☐ Determine nearby higher educational schools
- ☐ Review strategic plan to glean community groups; work in conjunction with staff to schedule meertings with potential partners
- ☐ Order business cards

DAYS 0-30
Hit the Ground Running

- ☐ In conjunction with board and staff, Identify community leaders
- ☐ Inform service groups of your speaking expertise and availability
- ☐ Determine current group memberships and consider groups to join
- ☐ Subscribe to local newspapers; read regularly
- ☐ Contact animal organization directors; begin to schedule visits

DAYS 31-60

- ☐ Schedule introductory meetings to all elected officials serving your community
- ☐ Identify coalitions or task forces already in existense, assess value in joining
- ☐ Review local Chamber of Commerce scheduleupcoming meetings or events; schedule some to attend; meet local community members and fellow business leaders
- ☐ Submit an Op-Ed in local paper introducing yourself and articulating key messages
- ☐ Request board members introduce you to their networks or community leaders
- ☐ Attend some popular community events
- ☐ Determine which professional associations may be valuable

DAYS 61-100

- ☐ Introduce yourself, join and ultimately serve on states animal welfare organization
- ☐ Consider conducting surveys with the broader community, including community leaders; access perceptions and experiences; identify needs for programs/services

Learning Tracks – *Milestone Tracking Workbook*

DEVELOPMENT: Key Donors, Stakeholders and Development Priorities

DAYS-60
Get Ready

- ☐ Gather donor/supporter metrics (i.e. how many donors, large donors, bequests, etc.)
- ☐ Gain knowledge of foundations, corporate support, and partnerships
- ☐ Seek opportunities for donor communications, planning and introductions
- ☐ Plan tiered, personalized communication to key donors, foundations, other VIPs
- ☐ Participate in pre-hire news announcements, press releases (See diagram 2 on page 5)
- ☐ Prepare "First 100 Day" introduction presentation introducing self, experience, approach, priorities, goals, your story and consistent message
- ☐ Become familiar with market studies and highly influential donor priorities

DAYS 0-30
Hit the Ground Running

- ☐ In conjunction with development staff, draft letter of introduction
- ☐ Finalize "First 100 Day" overview presentation
- ☐ Begin introduction meetings with key donors, foundations and other VIPs
- ☐ Begin press introductions
- ☐ Gain understanding of major donors, bequest pipeline, foundation requirements/responsibilities
- ☐ Gain understanding of board-level role in development activities, development committees, etc.

DAYS 31-60

- ☐ Determine how the strategic plan affects donor relations and plans/priorities for raising funds
- ☐ Send letter of introduction to all donors
- ☐ Continue personalized 1:1 and small group donor introductions
- ☐ In conjunction with Development staff, identify key community groups, professional organizations to greet
- ☐ Assess organization donor database, donor software and capability to produce key donor metrics and reports
- ☐ Gain understanding of organization success to cultivate and thank donors (philosop hy and process)
- ☐ Determine ability to segment donor database by gift levels and analyze historical movement between gift levels
- ☐ Continue personalized 1:1 and small group donor introductions

DAYS 61-100

- ☐ Schedule and meet with community groups, professional organizations, social clubs
- ☐ Begin attending donor calls, major prospect cultivation
- ☐ Consider hosting an all-volunteer reception
- ☐ Position donor communications around long-term vision

Common Mistakes to Avoid

Waiting—Don't wait until your first day to start thinking about your 100-day plan.

Buffer time—Don't jump in without taking adequate time to prepare. Consider a week of alone time to read and learn important details. In the *SAWA Tracks to Success guide,* we refer to this as a "soft start" when the animal welfare executive can learn and absorb as much information as possible about the new organization before officially beginning on the job.

Hasty decisions—Don't feel that you have to have (or know) all the answers.

Overeager—Don't create unrealistic expectations about what you can accomplish and in what timeframe.

Be diplomatic—Don't openly criticize previous regime or leadership; use it as an opportunity.

Avoid leadership in a vacuum—Don't expect the change to come to you…get out and meet as many people as possible, including key stakeholders.

Don't settle for average—Build a smart, capable management team you can trust right away.

Settling-in time is precious—During your first 60-100 days, don't spend more than 50% of your time outside the building.

Feedback for Continuous Improvement

This planning tool is a living document. We welcome your feedback on various components of this tool, your experience, additional resources, or simply tell us if this was helpful to you during your onboarding process.

We invite you to submit your feedback to:

Society for Animal Welfare Administrators
Attn: *SAWA Tracks to Success*
admin@sawanetwork.org

SAWA As A Resource

SAWA is an invaluable resource for information and guidance on a number of key managerial topics for the animal welfare executive. Visit www.sawanetwork.org.

Board of Directors – Sound governance and dynamic strategic planning

- ■ *Board of Directors Protocols and Tools Resource Center*: Handbook templates, sample policies, recruitment and evaluation tools
- ■ *Board of Directors Self-Assessment Tool*: Report card and guidance for improvement SAWA Associate
- ■ *Level Membership for Shelter Board of Directors*: Board leadership gain big picture opportunities
- ■ *SAWA Strategic Plan*: Share the Association plan with your leadership
- ■ *SAWA Strategic Blueprint*: Drive success on the strategic plan
- ■ *Listserv Rules & Etiquette*: Industry best practice

Fundraising Tools –Tap into the development community

- ■ *Fundraising profession mentoring and peer-to-peer networking*
- ■ *Benchmarking data, templates, timelines, and marketing examples*
- ■ *Access to expertise and community of professionals*

Human Resources – Build loyal team excellence

- ■ *Job Descriptions*: Approximately 50 industry-norm animal welfare positions
- ■ *Career Center:* Post Job Openings (SAWA members post each new job FREE for up to 30 days)
- ■ *Compensation & Benefits Survey*: Benchmarks specific to animal welfare
- ■ *HR Guidelines Resource Center*: Web based forms, employee handbook, sample guidelines, and robust links to resources
- ■ *Professional Certification*: Distinguish top leader skills, knowledge and achievements

Peer Networks – Your circle of confidants

- ■ *Virtual Directory*: Up-to-date contact information of peers and potential mentors
- ■ *SAWA Listserv*: At-your-fingertips conversation board
- ■ *Save the Date for SAWA Conferences (www.sawanetwork.org)* – Send your senior leadership team

Operational Best Practice – Safe, healthy and enriching environments

- ■ *Operational Protocols and Tools Resource Center*: Adoption, disaster planning, disease control and more...you name it, we've got it.
- ■ *Disaster Relief Memorandum of Understanding*: Community agreement template
- ■ *Shelter Guidelines*: Link to ASV Guidelines, including a shelter assessment and priority tool

Links – Connect to your industry partners, products, research, grants, and tools

- ■ *Data Collection & Research*: Make smart data-driven decisions
- ■ *Grant Source & Focus*: Link to key people to fund programs
- ■ *Allied Associations*: Guide to industry experts

USEFUL RESOURCES

Reading List

The First 90 Days by Michael Watkins

Assimilating New Leaders by Diane Downy

What Got You Here Won't Get You There by Marshall Goldsmith

You're In Charge, Now What?: The Eight Point Plan by Thomas Neff and James Citron

The Leadership Pipeline: How to Build the Leadership Powered Company by Ram Charon, Stephen Drotter, and James Noel

Creating We: Change: I-Thinking to We-Thinking - Building a Healthy, Thriving Organization by Judith E. Glaser

Ultimate Power: Gregory Goose, A Journey Over The Horizon by Judith E. Glaser

The Leadership Secret of Gregory Goose: First Day, New Job, Now What! by Judith E. Glaser

Coalition Building for Animal Care Organizations by Katherine A. McGowan (Shenar), Published by Humane Society Press, 2009

Organizations

ASAE and the Center for Association Leadership – ASAECenter.org

US Chamber of Commerce – USChamber.org

American Chamber of Commerce Executives – ACCE.org

BoardSource – Boardsource.org

Association of Fundraising Professionals – afpnet.org

SAWA as a Resource

See page 16 in this guide

Personal Notes

This area is intended for your personal notes, contacts, useful resources or other activities you may wish to complete during your on boarding process that were not covered or included elsewhere. Feel free to use these lines as a feedback area for what may be missing or how we might improve this tool in the future. As each item is completed, check the box to track your progress.

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Addendum: Board Checklist

The process of identifying a new CEO/Executive Director for an animal welfare organization falls on the organization's board of directors. This is a defining moment for any organization and should be carefully, thoughtfully and strategically considered. The following checklist is provided as a starting point for any board to consider as it prepares to search for and ultimately hire its new leader.

☐ Educate the Board About SAWA, How It Can Help, Services It Provides

    ☐ Share SAWA Tracks to Success to incoming executive.

☐ Appoint a search committee; determine role in defining, searching and selecting the candidate.

☐ Ensure the board is clear on the kind of leader required.

    ☐ What experience and skills are needed based on the mission and goals of the organization.

    ☐ Assess strengths and weaknesses of the current management team to determine needs.

    ☐ Are there community considerations, concerns or needs that the CEO must be prepared to address?

    ☐ Define (and stick to) requirements: educational, professional certifications, industry credentials, etc.

☐ If searching for a CEO because of a leadership termination, be prepared to answer questions about the situation and consult with legal counsel about what information can be disclosed.

☐ Contact SAWA to have job opening posted to career center.

☐ Assemble candidate package that includes overview information about the organization.

    ☐ Prepare detailed package for final candidates: annual report, operating budget, organizational chart, summary of strategic plan, newsletters and publications.

☐ Discuss confidentiality. By stage two, this becomes challenging. Be sure the candidates are aware and agree.

Approximate Timeline for Leadership Search

☐ Find and appoint an interim director (if necessary): 2 – 6 weeks

☐ Hire a search consultant (if necessary): 4 – 6 weeks

☐ Design the search process: 2 – 3 weeks

☐ Assess needs, develop/refine/finalize the job description and requirements: 2 – 3 weeks

☐ Appoint a special board search committee: 2 – 4 weeks

☐ Prepare advertising documents and begin recruiting: 6 – 12 weeks

☐ Screen applications: 2 – 4 weeks

☐ Determine who to invite for further review: 2 – 4 weeks

☐ Conduct first round of interviews and other assessments: 1 – 2 weeks

☐ Check references: 1 – 3 weeks

☐ Conduct final round of interviews and other assessments: 1 - 2 weeks

☐ Make the selection: 1 – 2 weeks

☐ Negotiate the contract: 1 – 2 weeks

☐ Notify other candidates: 1 – 2 weeks

☐ Welcome, orient, and support the new CEO: ongoing

    ☐ → refer to *SAWA Tracks to Success*

Addendum: Board Checklist (continued)

Some Tips To Consider During The Search

Consider a Candidate's Past Wisely—A candidate's past is a good indication of his or her future. Once you determine requirements for specific skills, the candidate's job history should be screened for those needs. However past jobs don't always tell the whole story and there is much value in intelligence, resourcefulness, optimism and visionary leadership potential. Be sure you see the complete picture before you make your decision.

☐ Consider an "assignment" that provides valuable feedback as part of the interview process.

☐ Design your questions to provide the feedback you need. I.E. If the organization needs a visionary type leader, consider posing a challenging industry-related question about the future and see how the candidate responds.

Rushing Too Quickly—It can be tempting to rush to hire because of terrific need, but this is a critical hire and therefore it's imperative that you take the time to find just the right candidate. Talking to an endless stream of candidates cuts into your productive time, but choosing someone simply because you want the process to be over can have profound consequences.

☐ Set the expectation with your board that the search process can take between six months and two years.

The Search for Perfection—The search for perfection can be a search team's biggest downfall. Prolonging the hiring process because you are waiting for someone with the perfect experience and the perfect personality who feels like a perfect fit can be as damaging as making your decision too quickly. There is no such thing as the perfect candidate, but it is possible to find someone who is "great" and the "best fit."

☐ Set the expectation with your board that there is no "perfect" candidate.

☐ Be sure to hire based on the qualifications for doing the job.

Listen, Don't Control The Interview—Candidates may be nervous and many board members are busy professionals with a lot to do. As a result, it can be an easy mistake to take control of the interview in an effort to move things along quickly. It is important to remember, the purpose of the interview is to get to know the candidate. A good interviewer will be quiet long enough for the candidate to convey all the things the search committee needs to know.

Use Reference Checks Wisely—The reference check process can be the most important part of the search process. Be strategic about how you learn about your candidates and how you use the reference check process. Remember, no one offers up a "bad" reference when asked, so make it a point to ask for multiple references, direct supervisors and talk with board members from the candidate's former organization. If you can gain access to others who have worked with the candidate (supervisors, co-workers and board members), you can gain some important insight.

☐ Always talk to the candidate's former supervisor.

☐ Ask the question: "Who else worked with this person that can provide some insight into how this candidate thinks and performs?"