CHOOSING A DIRECTOR GENERAL: THE SEARCH AND SELECTION PROCESS

Reference Guides for CGIAR International Agricultural Research Centers and their Boards of Trustees

No. 5
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A DIRECTOR GENERAL:
THE SEARCH
AND SELECTION PROCESS

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Guides in this Series:

1. The Role, Responsibilities, and Accountability of Center
   Boards of Trustees
2. The Role of the Board Chair
3. Creating a Well-Balanced Board
4. Building Effective Board Committees
5. Choosing a Director General: The Search and Selection
   Process
6. Evaluating the Director General: The Assessment Process
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Each CGIAR center is an autonomous, international institution governed by an independent board of trustees. The effectiveness of the trustees in discharging their fiduciary responsibilities, and in setting and overseeing center policies, is essential to the continued success of individual centers and of the CGIAR system as a whole.

For over two decades the boards have benefited from the dedicated service of many individuals who have brought rich experience and insights to their task. In the recent past they have also benefited from CGIAR guidelines and papers on the role of center boards, in particular those prepared by Professors Lowell Hardin ("Report on the Roles, Relationships, and Responsibilities of Trustees of International Agricultural Research Centers") and John Dillon ("Some Thoughts Toward Ensuring the Successful Performance of Boards in the CGIAR System").

Over time, the context within which the centers function has become more complex and challenging, as have the expectations of internal and external stakeholders. In response, center boards have been seeking new and better ways to discharge their basic obligations to their center and the system.

The idea of preparing a new set of reference guides on the role and operations of CGIAR center boards, taking into account new principles and practices of institutional governance, was advanced by the CGIAR Oversight Committee and the Committee of Board Chairs. The project was implemented by the National Center for Nonprofit Boards (NCNB), located in Washington, DC, and the CGIAR Secretariat, by a team made up of Selçuk Özgediz (coordinator), Maureen Robinson, and Pammi Sachdeva.

The seven guides in the series are based primarily on NCNB materials and CGIAR reports on center governance, and were reviewed by the Oversight Committee and the Committee of Board Chairs. In addition, the first guide, entitled *The Role, Responsibilities, and Accountability of Cen-
ter Boards of Trustees, was discussed and endorsed by the CGIAR at its 1996 Mid-Term Meeting in Jakarta, Indonesia.

The CGIAR Secretariat is pleased to make these reference guides available to the CGIAR centers and other interested institutions. They will be updated when necessary. We welcome reactions on their usefulness, and invite suggestions for improvement.

Alexander von der Osten
CGIAR Executive Secretary
Choosing A Director General:
The Search and Selection Process

Ensuring Effective Center Leadership

One of the major responsibilities of any board is to hire the organization’s Director General. With board members based all over the world and daunting logistical challenges to meeting as a group, CGIAR boards rely heavily on the Director General to undertake the day-to-day management of the center and to determine, with the Board Chair, which issues are brought before the board for consideration and approval.

The board’s responsibility is to conduct the search for a new Director General in a way that will attract qualified candidates; to hire the best person; and, once the new Director General is hired, to support that person and establish with him or her a process for setting goals and measuring performance on an annual basis.

The board depends on the Director General for dynamic, visionary leadership. The Director General looks to the board for authority, direction, advice, and support. Both are required for successful center operation.

Hiring a Director General, therefore, is probably one of the most important tasks the board faces. If the process is conducted thoroughly and carefully, it can strengthen the center. If, however, the search is badly flawed, an inappropriate choice can endanger the center for years to come. Allied with the responsibility to hire the best person for the job is the obligation to conduct regular evaluations of the Director General’s performance which is covered in another guide in this series. The process of setting mutual goals and acknowledging their attainment helps to sustain the confidence of the board in the choice of the Director General.
Preparing for a Leadership Search

Strategic Planning

The search for a new Director General is most likely to be accomplished with ease and success if an internal planning process is already in place. Planning is the way an organization sets its direction for the future, enabling—even requiring—the organization to assess its strengths and weaknesses, and threats and opportunities in the environment, and to develop strategies for dealing with them. A strategic plan will help a board to refine its sense of the leadership qualities and experiences needed in a new Director General.

If no planning process is in place, the board should give early time and attention to these important questions:

- Where do we want this organization to be in two, three, or five years? What should it look like? What should it be doing or not doing?
- In what areas are we succeeding? Where are we weak?
- What are the critical issues we are facing now and in the next two to five years?
- What changes in our environment are urgent and need consideration?

Addressing these questions up front will yield dividends when critical decisions are being made about the skills and competencies of the potential Director General. Sometimes boards will put the questions aside for the new Director General to address once he or she arrives, missing the opportunity to make a strong match between the needs of the center and the abilities of its new leader.

If a good fit is going to be achieved between the new Director General and the unique culture of the organization, the board should also give some thought, energy, and imagination to the essential ingredients of that culture. For example:

- What are the core values of the organization?
What is the organization really about, and why does that matter?

What behaviors are expected, taken for granted, rewarded, and punished?

What personal attitudes, values, experiences, and work styles fit well with this organization?

Articulating these ingredients in the early stages of the process will yield substantial results in the screening and hiring stages.

Designing An Effective Search Process

Overview

Even if the framework for a succession process is in place, the center’s search procedures should be reconsidered in light of the particular circumstances of this vacancy. The selection of the Director General is one of the board’s most important functions and a responsibility that requires the full board’s attention and involvement. Careful management is needed to ensure that the search process is neither too participative nor not participative enough, that deadlines are workable, and that expectations of board members and staff are realistic.

Begin Early

The hiring process should begin as soon as the announcement is made that the current Director General is leaving. A thorough and satisfactory hiring process can take from six months to a year. If the outgoing Director General is leaving voluntarily, the board should negotiate for at least three months’ notice to allow the search process to get well underway without the pressure of an immediate vacancy.

To minimize the disruption of a vacancy, the board should consider several alternatives.

- Appoint another staff member as acting Director General during the hiring process. If a suitable person is available, this has several advantages—allowing the board time to be thor-
ough in recruitment and screening; avoiding a leadership vacuum that can lead to power struggles and later problems, and offering the board the opportunity to assess the acting Director General's qualifications to fill the position permanently, if he or she is a likely candidate for the position.

- **Appoint an interim Director General from outside the organization.** While this option offers many of the advantages above, it is difficult to implement. The interim Director General will probably lack information and experience specific to the center and will not have the immediate confidence of the staff and stakeholders.

- **Appoint a board member as interim Director General.** While a board member has a more intimate understanding of the center's mission and programs than an outsider, this solution may create difficulties if the board member becomes accustomed to running operations and decides to become a candidate, or is unable to reestablish upon rejoining the board the objectivity required of a board member. This alternative requires a board member with administrative and scientific skills who is willing and able to shift locations and dedicate a significant amount of time to the center.

- **Speed up the hiring process.** Foregoing the time necessary to cast the net widely and conduct a thorough search is a risky choice. A great deal more time and suffering will be spent surviving a bad choice than are needed to make the best possible selection.

**Establish a Search Committee**

Appointing a search committee is usually the prerogative of the Board Chair or executive committee, as specified in the center bylaws. The committee should be in place within a few weeks after the announcement that the current Director General is leaving.

There are several factors to consider when establishing a search committee.
Number and composition. The committee should be small enough to work effectively as a group, while representing a cross-section of the board. Three to five members is a manageable size. In choosing the committee, it is a good idea to include at least one human resources professional (perhaps an outside consultant), and past and future leaders of the board. Also consider: (a) the balance and diversity of the group; (b) the ability of members to give the necessary time, and their knowledge, involvement, and commitment to the center; and (c) skills in decisionmaking and collaboration.

Tasks. Clarify the committee's tasks. How many final candidates does the entire board want to see—only one, or a choice of several? Does the committee have the authority to update the job description and to decide salary, benefits, and costs to be incurred? These issues are time-related. The more tasks that can be delegated to the search committee, the speedier the process. However, a balance must be struck between the desire to expedite the process, the degree of confidentiality required, and the board's need to maintain its sense of ownership over the decision.

Staffing. A member of the committee, a qualified consultant, or a member of the organization's staff will need to devote considerable time to staffing the committee's work. Whoever is appointed should be reliable, discreet, and able to devote sufficient time to the project.

Timeline. The Board Chair and the outgoing Director General should develop a realistic timeline, subject to review and approval by the board. A tentative set of dates for interviews and a final selection meeting may be set at this point. The committee will probably want to meet three to four times over the course of the search, and to confer regularly between meetings. The committee chair should make clear at the beginning of the process what the attendance requirements will be for the committee. Much time can be wasted updating members who have not been present, and the final decision will not be made as ably if everyone does not have the same information and experience with the candidates.
Use Appropriate Outside Assistance

- **Consultant.** A board may engage a consultant to conduct specific tasks during the search process—for example, to provide advice on organizing the search committee; to develop a pool of candidates; or to screen, interview, and check references. Whatever outside counsel is used, the board must take care not to delegate its major responsibility—making the final decision on who is hired—to others.

- **Specialist advice.** Someone with up-to-date knowledge of human resources should be involved in the hiring process. If such a person is not on the board and available for consultation, or, better still, on the search committee, committee members should educate themselves on the legal and other personnel issues involved in hiring. The cost of ignorance can be high. The board should consider hiring a specialist in personnel issues as a consultant during the process.

Refer to the Resources of the CGIAR Secretariat

The CGIAR Secretariat has information documenting the searches conducted by other centers. These reports contain useful information about the details of the search process—the placement of advertisements, form letters for correspondence with prospective candidates and references, job descriptions and job announcements, and cost—and a history of the search process, outlining each step in the process of recruitment, review, and recommendation of final candidates.

Update the Job Description

A good job description gives both the board and the candidates clear, accurate, and specific information about what will be expected of the Director General. It specifies:

- the general parameters of the position: overall purpose of the center, center programs, reporting relationships, budget and staff size, salary range, and benefits;
• areas of responsibility and specific results for which the person will be held accountable; and

• the qualifications in education, experience, and demonstrable skills that are required for the position.

The job description is usually updated by the executive committee, sometimes in consultation with the search committee. It is important, however, that the entire board understand and approve it. The position should not be advertised until an approved job description is in place.

Establish Salary and Benefits

Setting appropriate salary and benefits for the Director General is one of the most challenging tasks the board will face in the search process. If the outgoing Director General has been with the center for some time, his or her salary may not reflect current compensation practices in similar organizations. The Director General's job is both professionally and personally demanding, and recruiting a qualified candidate who can offer the vision, energy, and commitment the center requires may mean rethinking the level of compensation the center offers.

A good way to begin is to survey both the for-profit and nonprofit sectors for comparable salaries given the level of responsibility, number of staff supervised, and size of budget managed. The board should also take into consideration the geographic region in which the center is located, cost of living, travel, and other factors. To build and sustain a strong organization and to appeal to the best candidates, the salary should be at or above the median of comparable organizations. To offer less may jeopardize the future of the center.

Leadership transitions also offer an ideal time to evaluate the benefits package for the Director General. Benefits the board should include in the review are:

• housing allowance;

• health insurance;

• life and long-term disability insurance;
• professional development (memberships, subscriptions, travel, etc.);

• pension, retirement, and savings programs;

• hospitality allowance; and

• spouse travel.

Advertise the Position/Solicit Interest

The wider the net is cast, the greater the number of applicants who will surface. Advertising widely—in international, scientific, and professional publications—often takes a minimum of two months. Since many of the most likely candidates will not be actively seeking employment, the center cannot rely on advertising alone. To ensure a diverse, qualified pool of candidates, everyone involved in the search needs to use networking skills to solicit suggestions and invite applications from people they know. Some candidates may need to be encouraged to apply or to allow their names to be placed in consideration. Confidentiality and tact are important at this point in the recruitment process.

All advertisements and announcements should give a deadline for applying for the position.

Involving Staff

The staff perspective on the needs of the organization is valuable. Because of their daily involvement in the center’s work and constant exposure to the internal and external relationships that make up the operating environment of the center, staff may see factors that might be missed by board members. The staff’s cooperation will also be essential to integrating and accepting the new Director General into their daily work. Their opinions should be solicited in a structured, useful manner.

Staff, for example, may be encouraged to develop their criteria for selection. One or two staff representatives may be selected to participate in parts of the search process. The staff may be given an opportunity to meet and evaluate the final candidates, or they may be asked to evaluate
the candidates’ written materials and make recommendations on those to be evaluated further.

Staff should be kept informed about the overall search process and time frame for making decisions. A change in leadership inevitably stirs up anxieties and causes all staff to rethink their careers. Even when the board has no news about the process, simply demonstrating that it is being actively managed will lessen anxieties, allowing the staff to continue to be productive.

Honest communication is essential about internal candidates. It is a mistake to allow a candidate the board knows is not suitable to move through the selection process, even reaching the final stages. The Board Chair may have a frank discussion with a weak internal candidate about the board’s thinking. Conversely, if there is a strong internal candidate, the board may choose to make a quick scan of outside possibilities to establish a benchmark for the internal candidate and then move ahead accordingly.

In general, staff should be actively involved in assessing the strategic challenges of the center, in translating those into desired leadership characteristics, and in suggesting names and sources. Staff should not play a formal role on the selection committee. There may be panels of staff who meet different candidates and offer advice, but they should not feel they have a final vote in the choice.

**Involving the Outgoing Director General**

While the outgoing Director General’s perspective on the position and skills required is unique and valuable, his or her focus may be on the past, and his or her vision of the future limited. If appropriate and useful, the search committee should use the outgoing Director General’s time, knowledge, and skills as they are available and needed, but he or she should not be perceived as being directly involved in the selection process.

**Setting Priorities**

**Identify Key Qualities**

After the job description has been completed and the position advertised, the committee should identify the qualities that the ideal candi-
date will possess, in addition to the minimum qualifications listed in the job description. The foundation for these discussions should be the planning work done at the beginning of the process. The issues facing the center, its goals and priorities for the next few years, its organizational culture—all inform the qualities necessary in a new Director General.

Important and difficult questions that must be answered include:

- Is the organization already in the midst of rapid change, or does it need a new direction to break from an old, unsuccessful pattern?
- Is the center's primary need for an administrator, a scientist, a conciliator, or someone with fund raising and political skills?
- Does the center need someone who will lead in new directions or maintain what has been built to date?
- How important, relative to other criteria, are interpersonal skills, creativity, imagination?
- What values must the new Director General have?
- Must the new Director General have experience working with a board?

With these and other similar questions answered clearly, the board will be better prepared to evaluate the qualities of specific candidates. If the board has not addressed these questions through a formal planning process, the search committee should engage the board in examining the center's needs and directions.

Committee members should individually, and then together, prioritize the key leadership qualities or criteria identified through this process. Together, the group should choose and list in order of priority the five most important criteria. An outside facilitator may be helpful during this meeting. This is probably the most important step in the process; candidates who meet the basic qualifications will be screened and evaluated on the basis of these qualities or criteria.
Consider the Budget and Logistics

It is not possible to interview every qualified candidate. The committee should determine in a preliminary way how many candidates can reasonably be interviewed, and where the interviews will take place. In addition to time constraints, most searches will be constrained by budget considerations as well. The searches that centers conduct can cost in excess of $200,000. Travel for committee meetings and for interviews need to be realistically determined.

Screening Candidates

Review Résumés/Curriculum Vitae

If a wide net has been cast, résumés or curriculum vitae may be numerous. An efficient, thorough process must be established for screening them. Members of the search committee need to work within a similar frame of reference when evaluating candidates to arrive at a first, or long, list of well-qualified candidates.

Rate the Final Applicants

At this point the field has been narrowed to ten to twenty qualified candidates. From these must be chosen a number feasible to interview. The committee should attempt a preliminary ranking of the candidates.

This is a good point at which to check with candidates to confirm their continuing interest in the position. If candidates wish to continue to be considered, preliminary references can be sought to help search committee members refine their sense of the candidates.

Check References

Any written references received should be part of the evaluation material that is reproduced and shared with committee members. Written references are not particularly valuable and always need to be supplemented with references from knowledgeable people who are contacted personally.
As the committee narrows its selection to finalists, however, references become critical. Those conducting reference interviews should keep in mind the following:

- If a candidate has requested that his or her current employer not be contacted, this request must be honored. At some point in negotiations, however, the committee will need to ask the candidate to reconsider this request.

- To avoid lawsuits from former employees, employers are often advised to give no information about former employees except dates of employment. However, strategically placed telephone calls are extremely valuable in eliciting more information in most cases.

- A strategy that can help paint a broader portrait of candidates is to obtain the candidate’s permission to speak with references other than those provided. Original references may then be asked to recommend others who have insight into the candidate’s qualifications.

People contacted should represent a variety of perspectives. Ideally, the reference process should include superiors, peers, and subordinates, and key people outside the organization who are familiar with the work and reputation of the individual. In conducting an effective reference interview, keep in mind:

- The reference interview is designed to deepen one’s understanding of the candidate’s previous career and to compare the candidate’s self assessment and the committee’s impression with the views of others.

- A presumptive alliance exists between the candidate and the informant, so the recruiter must be able to persuade the informant to ally with him or her to obtain the richest picture of the candidate.

- A good reference conversation shifts from the inevitable initial guardedness to a collegial tone, indicating that the informant has joined in the task of building an accurate portrait.
Several members usually make these reference calls, or a consultant will be hired to bring focus and uniformity to the process. To ensure that the same information is secured on all candidates being considered, committee members may choose to develop a reference interview form that elicits the information the search committee most wants.

At all times during the process, candidates should be kept informed of their status. The committee should keep records of its discussions and decisions to be able to report on the search process to the board.

Confidentiality

Many candidates will not want their interest in the position to be made public until they are under serious consideration. The search committee needs to consider carefully at what point its work will be hindered by the inability to check references and discuss the candidate's interest and qualifications with others. Candidates need to know the point at which their candidacy is likely to become known to those outside the search committee, so that their continued interest in being considered can be reaffirmed.

Interviewing and Final Selection

Write Interview Questions

The search committee should return to the top five criteria developed earlier to determine interview content and to design a set of interview questions that will elicit candidates' strengths and weaknesses on each of these criteria. It is essential to ask the same general questions of each candidate. Some candidates may elaborate more than others; plan follow-up questions that might also be asked when appropriate.

The Interview

Depending on the nature of the search, the amount of time the search committee has budgeted to do its work, and the quality of the candidate pool, the search committee may feel comfortable in recommending candidates to the board without a first round of search committee interviews.
Certainly, the committee wants to be able to refer a number of candidates to the board for final consideration. Most boards will not welcome being offered a unilateral decision from the search committee.

While the interview is important, the board should not base its decision on a single meeting with the candidate. Multiple visits and multiple perspectives are critical to ensure a valid assessment. Some excellent candidates may interview badly, and some poor candidates may interview well.

At least an hour should be allotted for each interview. Two hours are better. In addition, the board should set aside time to rate and discuss each candidate after each interview. In addition to interviews with the board, final candidates should be scheduled to spend some time with senior staff. Sometimes finalists are asked to present a seminar to staff on a topic of programmatic interest to the center. In other cases less formal meetings take place with senior staff to allow candidates to learn more about the staff and the center, and to allow the staff to share its opinions of candidates with board members.

Keep in mind the following interview-related factors:

- **Before the interview** the candidate should have received information about the organization, including a budget, annual work plans and strategic plan, program information, and the annual report.

- **The interview structure** should be designed to put the candidate at ease and elicit the maximum amount of information in response to questions. In advance, the board should decide who will take the lead and open and close the interviews. The board may assign certain members to ask questions of each interviewee, may allow all members to ask questions, or may decide that only the Chair will ask questions.

- **Internal candidates** should be screened and interviewed in the same way as those from outside. A decision to hire an inside candidate should be made after a full comparison among all applicants.

- **Social contact**, at a meal or other occasion, may provide board, candidate, and staff with an additional opportunity to learn about
each other and the center. This may be important if candidates will need to relocate with spouses and families.

**Offer the Position**

Assuming there is general consensus among board members about the leading candidate, it is usually the prerogative of the Board Chair to offer the position to the selected candidate.

If the salary range was stated in the job description, the specific salary must now be negotiated. The board should give the Board Chair clear limits within which he or she may negotiate. The Chair should be familiar with the candidate’s current level of compensation and benefits before making an offer.

The Chair also needs to establish a starting date and to make plans for orientation and introduction to the board and staff. Introduction to the board and staff should take place as soon as the selected candidate accepts the position, even if he or she will not start work for weeks or months.

**Effecting A Successful Transition**

**The Board’s Role**

The job of hiring a new Director General is not completed until the new leader feels he or she has joined the center in a meaningful way. In the initial transition the board can help in several ways.

- *Educate* the new leader on center history in an objective way, so that the leader does not feel trapped by history, but feels sufficiently informed either to build on it or to knowingly take a new course where appropriate. Boards carry responsibilities for both continuity and change. Where they can bring a sharp sense of previous progress, they can help a new leader feel he or she is building on prior success rather than starting over.

- *Connect* the new leader with relevant key external resources.
• *Work with the new Director General* to set ground rules for how board leadership and the Director General will interrelate. Talk candidly about the kinds of board meetings that each regards as useful, and mutually critique the first few board meetings. Because the Director General reports to the board, it is easier for the Board Chair to ask the Director General for feedback about the board meeting than for the Director General to volunteer such feedback.

• *Communicate openly.* As a new leader begins to take hold, inevitably some people will be disappointed. Too often those disappointments are detoured into gossip instead of channeled into direct conversations. Whenever a board member hears a complaint from staff or key outsiders about the new Director General, if the person has not spoken with the Director General directly, the board member should suggest such an approach.

• *Help the new leader avoid the trap of doing too much too soon.* If the board is sensitive to overload and schedules, it can help the leader build his or her credibility by underpromising and overdelivering versus the reverse.

**Decide on a Performance Review Process Before Hiring**

Part of the committee’s final report to the board should be an outline of the performance review process to be used for the new Director General. This process should have been discussed with the incoming Director General before he or she accepted the position. Everyone must know that there will be a clear, objective, and adequate process to evaluate the performance of the new Director General after a suitable time—usually six to twelve months.

If a review process existed for the former Director General, it should be evaluated and either changed or continued. If a clear process has not existed in the past, now is the time to institute one. The benefits of establishing a clear annual work plan and review process before hiring a new Director General are:
- knowing that a process exists allows everyone time to settle in while maintaining the board's oversight of the Director General's performance; and

- having a process in place lessens the disastrous possibility of having to launch an evaluation process when a crisis erupts.

In the first board meeting after the new Director General joins the center, the specific details of the evaluation process should be discussed, along with the board’s, Director General’s, and center's goals and priorities for the immediate future and the coming year. A new team is being built, and it will be built on clear expectations, mutual respect and trust, and a commitment to the values and goals of the organization.

References


This publication provides an overview of the essential steps in the process: identifying important characteristics of the next chief executive, revising the job description, interviewing candidates, and rating candidates.

Suggested Resources


Assists in identifying eight ways the chief staff officer can strengthen the governing board so both the board and chief executive work effectively to fulfill the organization’s mission.

Describes the entire transition cycle, from the early detection of a need for leadership change through the search, selection, and transition. Contains advice for board members on whether to hire an executive search firm, and guidance on the recruitment process. Also includes information for the incoming executive, and how to manage the transition into the new position.


An overview of the stages in leadership transition. Includes a list of questions to use in finding a new chief executive, sample questions for checking references, and tips on common mistakes made in this process.


A comprehensive tool to aid boards in one of their most critical responsibilities. After an examination of the benefits of assessment with suggestions on creating an effective process, a questionnaire is outlined that addresses major areas of the chief executive’s responsibility. A self-assessment section for the chief executive to complete is also included.