



## Go the Extra Mile in a Presidential Search

by Robert H. Perry and Allen E. Koenig

HERE ARE SOME WORRISOME STATISTICS: As recently as 1995, an average of 11 percent of all college and university presidents remained in office less than a year, and 48 percent stayed less than five years. And that's the good news. Those numbers show an improvement from 1990, according to The American College President, a report published earlier this year by the American Council on Education. At that time, 12 percent of higher education presidents stayed in office less than one year and 52 percent less than five years.

Although it might be easy to quibble over the precise statistic tracking the average length of presidential terms, no one would take issue with the, obvious. All of us know of precipitous departures by presidents for whom the "fit" just wasn't right. While these cases may be scattered and isolated, they are symptomatic of a much larger disorder. When more than one new president in ten fails to last a single year, and one in two serves five years or less, too many "bad hires"-to use the lexicon of executive search consultants-are occurring. Why, and what can boards do to plan and oversee more effective presidential searches?

The obvious culprit-a lack of talent-is easily dismissed. There is considerable leadership talent inside and outside of higher education, including experienced incumbent and former presidents, senior administrators with high potential, and nontraditional candidates whose backgrounds lend themselves to new roles. So given this strong supply of candidates, the "bad hire" issue narrows to process questions: Is the presidential search process sufficiently sophisticated and inclusive to yield the best possible candidates? Do search committee members use comprehensive due diligence that exceeds routine verifications to determine a candidate's motivation and cultural "fit"?

Many trustees would define "due diligence" using business terminology to identify a function that takes place after a deal essentially is done. In the recruitment parlance of higher education, however, due diligence begins when finalists are announced publicly and confidentiality has ended, but before a governing board has selected its top candidate.

Once the process has reached this eleventh-hour point, a search committee usually begins routine due diligence: formal reference checks, terminal degree verification, credit checks (because of the office's fiduciary responsibility), civil and criminal litigation checks, and extracts of media coverage. But routine due diligence rarely includes a critical extra dimension: visits to finalists' home campuses. We contend every presidential search always should include such visits.

However, for home-campus visits to be effective, they should build on skilled interviewing and thorough reference checks-the two core components of a presidential search. Each of these critical tasks is more difficult to execute than you might think.

Good Beginnings. Unlikely as it may seem, interviews are not always reliable indicators "of the best candidates. Faulty interviews can cause committees to reject candidates with high potential and overrate weak ones. The time-tested, nearly foolproof predictor of a successful new president is an individual's track record verified by professionally conducted reference checks.

Naturally, some search committee members are dubious and point out many reasons for the glut of "bad hires" and the disproportionately high turnover of academic presidents. Indeed, there are many reasons. Leading the list is a misplaced reliance on interviews to answer a wide array of questions and serve as a barometer of potential performance. A closer look at interviewing and reference checking is warranted.

- Well-intentioned but ill-prepared people usually conduct interviews, rendering the interview process less than reliable. Unfortunately, almost no one on a search committee has formal training in the art and science of interviewing. (This is not surprising, considering that interviewing historically is viewed as a skill all supervisors automatically possess.) However, search committees generally are receptive to coaching and open to developing penetrating questions.
- Reference checking is handled poorly more often than professionally. In an alarming number of cases, reference checks are perfunctory and contribute little insight. References from individuals the search committee or consultant has discovered—as opposed to references volunteered by finalists—often are the most revealing or important.

Today, most midsize and larger institutions use consultants to help plan and conduct presidential searches. Consultants are most helpful early in the search by conducting effective, "behind the scenes" interviews and identifying and presenting top prospects. Over time, search committees (assisted by a consultant or on their own) will winnow the slate to three or four finalists, each of whom presumably meets prerequisite qualifications—with track records subject to verification.

At this point in the search process, committee members must address questions of fit and style—subjective assessments based on members' perceptions and instincts. But they are susceptible to what can be costly errors if they assume they have learned all they can about a given finalist and that no further discovery is possible. The opposite is true. In fact, a process that employs thorough due diligence can reveal a great deal more information—information just waiting to be gleaned during visits to finalists' home campuses.

**Home Field Advantage.** Granting finalists nearly unfettered access to representatives of all constituencies and facilities on your own campus is a crucial part of the presidential search process. If one accepts the basic tenet that a presidential search is a "50-50" proposition, turnout—in the form of a visit to a finalist's home campus—not only is fair play, it is required. Although home-campus visits occur in the absence of the finalist, a search committee naturally must seek the candidate's permission to conduct such a visit. Although some candidates may be reluctant, most will see the merits of the visit and applaud its purpose. On a typical campus visit, a search committee team and consultant may speak with as many as 40 to 60 people. Truth is, such visits usually reveal some ambivalence from interviewees—no one wants to lose one of his or her best colleagues. Even so, the marvelous collegiality that is omnipresent in academe asserts itself, and interviewees inevitably wish their associates well.

Finalists should help arrange the itinerary of a home-campus visit by distributing copies of an executive search profile or "leadership statement" prepared by the searching institution. This statement describes the institution, the qualifications the institution seeks in a new president, and the challenges the new president will encounter. In this way, everyone with whom the team meets will be able to compare the two institutions and reflect on the candidate's ability to fill the new position. This preparation saves time and facilitates meaningful discussions.

The visiting team begins the day with the finalist and his or her spouse and then meets with groups or individuals that might include trustees, the president, faculty, peers, members of the finalist's staff, students, community leaders, and alumni. The team's goal should be to learn firsthand about the finalist's accomplishments, management style, and interpersonal skills. A home-campus visit also gives the team the chance to test concerns that may have arisen during interviews or reference checks and to cast more light on the unknowns, such as fund-raising potential and the ever-elusive "leadership quotient."

The dynamics of these visits can be fascinating. At the outset, the team may agree that Finalist A is the leading contender, B a close second, and C less certain. Invariably, some stocks go up and others go down; few remain unchanged. In many cases, a home-campus visit has determined that a finalist,

considered the second-in-command at his or her institution, really was running the university and serving as a surrogate chief executive. There's nothing like seeing someone on his or her own turf.

**Mitigating Concerns.** With all these positive attributes, what's the downside of a home-campus visit? First, the searching institution may be operating on a tight budget. Reluctance to add expense certainly is understandable, considering the costs of travel and lodging for a team of four or five people visiting three or four campuses spread around the country. However, when search committees view such expenses as an investment in obtaining the best possible president and as a way to prevent the high cost of making an unwise selection, they may see the expenses in a different light.

A finalist who is an incumbent president also may voice a valid concern, perhaps this way: "I have nothing to hide. In fact, I'd love the opportunity for 'show and tell' but what if I'm not selected? I'm afraid I'll be viewed differently in the future." These concerns pop up infrequently (in less than 5 percent of the recent visits we've conducted) and can be handled effectively using other measures-video and telephone conferencing with selected trustees, faculty, and staff, coupled with an informal or unofficial campus visit. Thus, anxious incumbents are protected.

On occasion, a particularly interesting twist in the process occurs. Several years ago, a search committee was considering a finalist who was highly motivated, energized, and determined to make the best case for being chosen for the presidency in question. The arrangements were made, guidelines explained, and schedules and itineraries confirmed. In the visiting team's first meeting with a group of administrators, one member posed an important question and received an appropriate response. In the next meeting, he repeated the question and received the same answer, almost verbatim. With some suspicion, he asked the question again in the next meeting-this time of an elderly faculty member who leaned back in his chair, stared upward, and finally said, "Hmm, let me see. That question came up at the rehearsal dinner the other night..."

Although this exchange is an amusing anecdote, it also underscores the extent of discovery possible during home-campus visits. The faculty member's offhand remark spoke volumes about the candidate's positive motivation, initiative, and drive; at the same time, it raised questions about his judgment and style.

A postmortem of problematic and short-lived presidencies invariably suggests a number of causes. In general, however, when a particular presidency was not the "right fit" for the candidate's skill and motivation, chances are the hiring decision was based on insufficient information. Home-campus visits can provide search committees and governing boards additional information and insight, which help them make better judgments leading to more successful presidential searches.

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