

Why Our Client Did A Happy Dance

by Joseph A. McCormack

A successful search for an Executive Director requires an effective partnership between a search consultant and the client. That's a statement so obviously true, it hardly seems worth saying, except that it seldom works so successfully as it did for us recently.

Some clients think the search consultant should shoulder the entire burden for the search, from the identification of sources and prospects through final reference checks. Isn't that what we are paid to do as partners? Other clients, lacking trust or confidence in the partnership, may compete with the search firm conducting their own independent outreach to identify and evaluate candidates, leading to unnecessary confusion on the part of sources and prospects.

A year ago, we were retained by TransForm, a progressive advocacy organization in the San Francisco Bay Area, to recruit their Executive Director. There were several challenges: we were seeking a successor to the long-serving and beloved founder; the organization was being led by interim co-directors, which could add complexity to the process if they adopted that as a permanent leadership structure; and the organization was in its final year of several multi-year grants that would have to be renewed or replaced. The client, which views its mission through an equity and inclusion lens, was determined to hire an Executive Director (or directors) with a deep commitment to those values. Add to these factors the regional cost of living, among the highest in the country, and it's not an easy search.

What distinguished this partnership from all other client relationships in my 30+ years of experience was the whole-hearted involvement of board and staff, including the staff representative on the search Committee, in leveraging their relationships to provide valuable sources and possible candidates for us. There were no hidden agendas or any mistrust of our capabilities – only the desire to achieve our common goal, without regard for who'd get the credit for success.

A mentor once told me a search consultant's experience is "a mile wide and an inch deep," but every client is an expert in their program area and strategic goals. The organization, its board and executive team have relationships with funders, advocates and sector leaders, whose recommendations are worth countless hours of the data mining that we engage in for a search. Open weekly communications helped us refine our focus at every stage of the process. Indeed, some candidates could only be persuaded to apply with a direct approach by client leadership, which they reliably supplied. When we needed a quick and informal reference, our client could speak candidly and confidentially to a trusted source who would likely be more open with them than with us.

With the advent of Covid-19, the work from home directives and the racial justice uprisings, our client, like many organizations, experienced financial and morale challenges. We were also being

outbid for talent by wealthier organizations such as consulting firms. Our client drafted talking points to respond to these issues and distributed them to everyone on the board and staff and those involved in the search. This enabled all of us as a team to deliver a consistent and credible message to prospects and candidates. When we work as one, we all work more effectively.

Everyone on the board and staff played an important and constructive role in the recruiting and evaluation process. Given the limitations of the pandemic and TransForm's transparent, collaborative organizational culture, the final interviews consisted of five Zoom interviews: one with each of three staff teams, one with the Board of Directors, and one "ask me anything" session with the outgoing Interim Executive Director. The extra time and effort it took to set up multiple meetings with each of the finalists ensured buy-in from everyone before reaching a final decision. Overall, there was a healthy distribution of work, enormous patience, acknowledgement of expertise on behalf of both partners, and an approach to problem solving that was never finger-pointing and only constructive.

When the final candidate was selected and he accepted our offer, the staff made a video recording, which they shared with us, where they cheered the hard-working search committee and welcomed their new leader with a happy dance. We always do our very best to add value to the search process for our clients, and we are well paid for our work. But the happy dance was a heart-warming reward and a tribute to the success of one of the best executive search partnerships I've experienced.

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