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## DOUBTS AT THE ALTAR: WHEN SEARCHES FAIL

*Posted on August 1, 2015*

The miscalculations and mistaken assumptions surrounding many searches can mask serious underlying issues that may jeopardize landing the candidate of choice, undermine a new head or damage the relationship between the newly appointed head and board.

Serving on a search committee is an honor and one of the most important responsibilities a trustee will ever undertake. The chair plays a pivotal role, not only in the search but in ensuring a smooth transition for the head.

### 1. Inside Candidates

One of the first challenges facing a search is how to deal with internal candidates. Some search committees believe it is wise to suggest that one or more insiders throw their hat into the ring. While the old adage "the devil you know is better than the devil you don't" may seem to have some merit, such candidates often have little or no realistic chance of success. If the "run" they make is destined to fail, the school will be left to manage their unhappiness or disappointment. In the worse case, the bypassed insider could undercut the new head with teachers or parents.

The assistant head of one school asked to be considered, but the search committee turned him down. Having been there about 25 years, his flaws were only too well known, often why search committees do not choose insiders. He was also the confidante of the prior head.

In the new head's second year, the assistant head began sensing and stirring up unrest among faculty. He became a subtle rallying point for teachers making an end run to the board suggesting that the board should not renew the new head's initial three year contract. The assistant head met with the board chair and while acknowledging some of his own mistakes in dealing with the new leadership, laid out a long list of alleged issues with the new head, including an inability to understand "our" culture. The assistant head made it known to other board members that if they did not renew the contract for the head, he would be willing to serve.

Sometimes there is one strong inside candidate whom the board really wants to appoint but feels that it must undergo a search in order to satisfy the community; engage in a



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"transparent" process; and to grant legitimacy to that individual. Such a search normally discourages the best contenders who see the handwriting on the wall early on. The word is out that the insider is clearly preferred. What if some new information or a new development makes the internal candidate less attractive, or a deal cannot be struck? There is no one waiting in the wings.

Less than 10% of inside candidates are fired, while almost 80% of new "outside" heads will be fired or not have their contracts renewed within their first five years. Choosing an insider thus seems to ensure greater stability yet independent schools seldom make that decision. Schools tend to want "fresh blood," unless tradition and the culture are deemed to be so important that an outsider could not really adapt to it or might make efforts to change the culture in ways that would upset faculty and alumni.

Thoughts:

1. Discourage any but the strongest. Convey your decision firmly early on to any "inside hopefuls". Give a consistent clear message to the school community about that decision and do not waver.
2. Do not appoint the inside candidate as an Interim or Acting Head. That will drive away savvy, qualified outside candidates and give the insider an unfair advantage.
3. Make a complete informed and objective assessment of whether the insider fits your profile, and could do the job very well and whether a formal search is really necessary for the "optics." A highly qualified inside candidate might indeed BE the best choice. It is not always crucial to conduct a formal search given its real costs and attendant political (and potentially damaging) maneuverings by various constituents to choose their preferred candidate. Another important consideration is transition time: inside candidates need little time to adjust to their new role while outsiders need at least three years to do so.

## 2. Compensation Issues

In a recent situation a head candidate was told by the search consultant that he would be hearing from the search chair with an offer. The value of the total offer was less than what he was currently receiving. Apparently, the search consultant had not probed sufficiently or counseled the search chair adequately about compensation expectations in the marketplace.

The candidate was a self effacing type for whom "negotiating" was unpleasant and was dismayed to receive such an offer. He wrote back to the search chair that he would decline, and the search chair called the consultant in a panic. Even after repeated attempts to reopen the dialogue and renegotiate the package, the candidate refused to budge. He felt that such an offer may well reflect the kind of board with which he might be working. All parties felt the



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effects of miscommunications and let down. The School search committee was forced to start anew as none of the other potential candidates were the caliber of the one who rejected the offer.

Some search firms charge a fee which is a percentage of the value of the candidate's first year salary. This is standard practice in the business world and moderately common in the non profit world. However, it can backfire and be perceived by some as a conflict of interest.

In one recent case, the search committee wanted to offer a package to the candidate of choice but made a very conservative offer, well aware that the higher the offer, the higher the amount they must pay to the search firm. That was a miscalculation as the candidate opted for another job, based at least in part on the perceived "low ball" offer.

Sometimes after receiving an offer, the finalist raises the "ante" by asking for things that were not a part of the original compensation conversation with the search consultant or the search chair. These might include spousal employment, remodeling the head's house, or other after thoughts. They could be totally fair and natural OR it could indicate a future pattern of behavior by the head of conveying one sentiment at one time and changing course unexpectedly at a different time or for a different audience.

The chair may grant these requests in order to land the preferred candidate, but an underlying resentment about that may linger, and the new head may find him or herself under more pressure to perform.

Thoughts:

Ensure that your search consultant is skilled in negotiating the complete compensation package and can bring quick "closure" to the process OR seek an outside experienced facilitator to do this.

In one search led by another firm, the search and board chairs called Littleford & Associates and said that they thought that the bargaining would be simple but that the candidate kept making new requests. In fact, during the early discussions, the search committee received the impression that he might be willing to move to this less expensive part of the country for less money than he was receiving currently. Now the candidate was balking. He told this consultant that he had never intended to imply such a thing and he would not be coming for less than his present package.

The search committee felt pressed both by the total amount needed to meet the expectations of the candidate and by the jump it represented from the predecessor's package. They had not



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anticipated this. The predecessor was a woman who had been promoted from within, and females and insiders are often underpaid in the marketplace. The recipient of the offer was a male with many years of headship at two prior schools. He knew his value and turned the bargaining over to this financial advisor to discuss with the search chair.

The advisor's tone and corporate style offended the search committee. The initial agreement began to unravel. At that point, Littleford & Associates was retained. Schools often hire our Firm for this purpose even though they have used a different consultant for the search because not all search firms have the same degree of expertise in negotiating the final agreement.

We asked the candidate to remove his "spokesperson" from the equation and to specify his priorities. We asked the search committee to step up the offer but not to cover some of the non essential and "side bar" items. Ultimately, the candidate found the job attractive enough not to risk losing it over some relatively minor points.

Some few years later, the head is still at the new school and has built a solid record of accomplishment with the School and a strong relationship with his board. His package has increased commensurate with his performance.

Thoughts:

1. Consider negotiating a fee for the search consultant, unrelated to the final salary package for the candidate.
  2. For the candidate: As much as possible, lay all your cards out on the table. Know on which points you are willing to give ground and which are nonnegotiable for you and your family. Communicate openly with the search consultant.
  3. The more protracted the negotiations, the greater is the potential for damage to the relationship between the new head and the key board members who have been entrusted with the responsibility of reaching an agreement. Your search consultant may or may NOT have the most complete data available on all aspects of the package: salary, retirement plan options, housing and other benefits. Littleford & Associates has undertaken over 2000 such reviews worldwide in the past 22 years. Our firm has the most comprehensive database in the world on this topic.
3. Concern Regarding Education of Children and Meaningful Work for a Spouse  
Most head candidates will not consider seriously an offer unless the educational choices for their school age children meet their various needs. A school engaged in a head search lost a very qualified candidate due to the lack of local educational resources for her child whose special needs were critical in the evaluation of the options available. The search committee



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made every effort to find accommodations, but the area resources and curriculum were simply not a fit. If the inability of the school (or alternative local schools) to meet a child's needs satisfactorily is a "deal breaker", it is best to be upfront as soon as possible so both the school and the candidate can pursue other options.

In another recent case, the head's spouse reluctantly gave up her promising marketing career in a large metropolitan area. The new school's more rural location made any reasonable and comparable job opportunities unlikely. The spouse's feelings of a lack of professional fulfillment increased over time and gradually eroded the head's and the family's desire to remain long term.

Or, a spouse may have been gainfully employed in a satisfying position within the former school. This could be the role of the "first spouse" which can be a demanding AND gratifying (and sometimes a paid) job. This is often the case in a boarding school or in any school where supporting the head in major fundraising efforts is particularly important. If there appears to be no value placed on the "first spouse" role in the new school, or there is no suitable internal position available then the spouse may again feel a lack of professional fulfillment.

Thoughts:

1. Important transition issues encompass a broad range such as the children's education, the spouse's employment and suitable medical services. (More on the transition committee below.)
  2. It is not unusual for a school to pay for the tuition of the children locally, if the new school does not provide the appropriate context or grade levels. Note that this is a taxable benefit. The school may or may not gross up the benefit in order for the head to remain 'whole" from a tax point of view.
4. Chemistry with the Search Committee and Chair:

The successful candidate will create some chemistry or a "connection" in the search process. The old adage that the first and last and/or most charismatic candidates have the edge does appear to hold true. A rapport between the search chair and candidate is crucial to the candidate's belief that the search chair is really the leader of the committee.

In one search, the chair allowed faculty, parents and other board members to influence unduly the direction of the committee. The semi-finalist and finalist candidates eventually picked up on that signal as they heard the personal agendas of members of the school community. It raised doubts in their minds about who was in charge then and who their "boss" would be.

Candidates need to feel a bond either with the search chair or with another key member of



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the committee. They need to be sold on the school fully as much as they are trying to make their own case. Search committees that just "screen" and do not sell, or appear to have handed over the process to one or more vocal constituent groups, often lose their first choice candidates and either settle for a second or third choice or start the search again.

Thoughts:

1. Search chairs need to guide their committees firmly. There can be only person who interfaces fully with the search consultant. The candidate needs to hear one "voice", even if that voice is a consensus reflection of the Committee.
  2. The partnership of the chair and head is a well known ingredient in the health of schools and boards. Many of those partnerships are forged in the process of the search as the parties get to know one another. It is always preferred that the search chair and the board chair stay on for at least one year after the new head is hired.
5. Looking for the Messiah or the Charismatic Leader

Most search committees want an educational visionary with strong people skills, a pied piper with students, a fund raiser with the ability to pull in six figure gifts, an astute financial manager, and an enrollment and marketing genius. They will find it easy to embrace someone who loves sports, has bright well-behaved children, a selfless charming spouse and impressive academic credentials. He or she should also be a prodigious worker whose door is always open.

Yet it is important for the profile to signal priorities. A statement of the top one to three qualities that are MOST needed at this stage of the school's history is critical to attracting candidates who may be the best fit.

Ultimately, search committees often choose someone very different from the profile developed initially. That is because "chemistry" and a successful visit often trump the official skills stated in the profile.

School search committees express a desire for someone who has "presence" and "magic" with people. Thus, there are many schools that have chosen form over substance, flash over long term effectiveness and people pleasers over those who can make the critical and sometimes tough decisions.

In a search for an elementary school head position, someone with outstanding university and secondary school credentials but little elementary school background or experience submitted a resume. Due to a connection between a search committee member and this applicant, an interview was granted. The candidate wowed everyone with a very engaging



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personality and was selected. He lasted two years and his contract was not renewed.

Thoughts:

1. There is no perfect candidate. Every candidate's strength is also his weakness. The key qualities are basic people and organizational skills. Technical expertise can be learned or bought in the marketplace. The vast majority of schools have heads who grew to become great financial managers, fund raisers and marketing whizzes but who knew very little about those areas when they first became heads of school. Furthermore, the best leaders know how to build a strong team which buffers and complements his or her weaknesses.
2. Most heads are former teachers. Most teachers are care givers and not risk takers. Most heads are risk averse, and that flows from their growth from the teaching "mode." The more analytical the head, the less charismatic he or she may appear. BUT the more successful he or she may be in the long run for having not made decisions that modify or affect the culture too quickly.

#### 6. The Pendulum Effect

One school replaced a long serving but tired head with a younger dynamic visionary who brought enormous energy and drive to the school. He was exactly what the school thought it wanted, and he set out to implement the long list of changes that had built up over time and were being demanded by the board. The new head quickly became seen as a "bull in a china shop", i.e., being insensitive to cultural norms within the school and pursuing excellence and change at a pace that could not be endured. He was gone within three years.

He was succeeded by a "healer" with a laid back non confrontational, "diplomatic" style. That was what the school needed until five years later when that head saw a need to assess whether his style was providing effective, forward moving leadership for the school. Board members and staff were beginning to raise this question. He had the wisdom and flexibility to make some necessary modifications in his approach within the limits of his style and age. He thus enjoyed a long tenure at this school.

Thoughts:

Try to avoid the trap of choosing a leader repeatedly with a polar opposite style and personality from the preceding head. It results in too much instability for the school in the long run.

#### 7. Lack of Healthy Board Governance

All searches will lead to an unhappy outcome if the board does not have first an effective chair and a well trained board who understands and applies the principles of healthy board practice.



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Most search candidates can pick up signals about governance through interviews in the search process. Trustees who speak out of turn, criticize the previous head and gossip about fellow trustees or administrators send the message that this is an unprofessional board that could turn quickly on the next head.

One of the most positive draws for a candidate is knowing that the board operates professionally, seeks to learn and enhance good governance behaviors and particularly that the committee on trustees functions effectively in selecting, evaluating and guiding trustees.

The need for professionalism extends of course to the search committee. Handling reference checking with complete confidentiality and diplomacy, especially involving sitting heads whose interest is not known to his or her current school is of paramount importance. The search consultant must provide some formal guidance and training in this matter.

Boundaries and channels must be observed at all time. There can be no side bar communications between the search committee and other constituent groups, including other board members, unless part of the rules agreed upon at the outset.

Thoughts:

Healthy governance behaviors and good practice begin with the committee on trustees, the most important one on the board. It is charged with cultivating, screening, inviting, orienting, training, evaluating, warning and if necessary, removing trustees.

8. The Importance of Transition Planning Boards love the excitement of the "hunt." "Long live the king" refers to the search for a new head that excites and inspires the search committee. The "king is dead" is the reality about the departing head.

The search is the easier stage relative to the transition phase when most schools drop the ball either out of fatigue or lack of knowledge or guidance. The transition phase is crucial.

Thoughts:

1. There needs to be a transition committee which is small, confidential and composed of wise highly respected board members. Its key role is to ensure that the head does not fall into "traps" or cross powerful and important figures in the faculty, parent body, board or alumni.
2. The transition committee is also charged with helping to ensure a smooth transition for the head's family including the physical move, school placement and the role of the spouse.
3. The transition committee needs to remain in place for at least a year, and perhaps for up





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to two years beyond the welcoming, honeymoon first year.

4. Such a committee should not micro manage the head or be intrusive. Its primary function is supportive and advisory.

All searches that result in the selection of outsiders cause some loss of momentum for the school during the two to five year transition time when the new head adjusts to and changes the culture, policies and personnel to varying degrees. Fairly high turnover of teachers and key administrators in the early years of a new head's tenure is common and can cause some consternation within the community. It is important to avoid overreacting to such events which are to some extent natural and appropriate.

9. The "Middle Man Theory" : When an Interim is a Good Idea

This is also known as the "sacrificial lamb theory" because the person who follows a valued very long term head is often gone within three years. Why? The departed beloved head often attains "sainthood." These schools might have done better with an Interim head who could release the internal pressures of praise (or criticism) about the previous head, allow a clean airing of previous hidden problems, and not saddle the new leader with being seen as a polar opposite of the valued outgoing head.

Thoughts:

Interim or Acting heads are a good option when there is insufficient time to conduct a full national search; when the prior head leaves suddenly; when the community needs some healing; or, for example, when the prior head was a pied piper leader much beloved by all. Be sure, however, that all parties and constituents are clear about the Interim's future at the School.

10. Search Committees and Their Private Agendas

In the formation of the search committee it is important to determine whether the search will be centered only in the Board, include some non board members such as teachers, alumni and non board parents OR whether there will be advisory committees of students, parents, faculty and alumni who may meet semi finalists and finalists and give their to the board search committee.

A head search should not be a democratic process. Letting too many people have input and a role can be risky. Non board members have no training in basic board governance, such as maintaining confidentiality and respecting boundaries and channels. As soon as the new head makes a "misstep" one constituency or another (typically the faculty) reports that he or she was not their first choice in any case.



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All committee members have private agendas at some level as each seeks a trait or experience in a new head that reflects his or her own definition of the mission. However, some members may have an inappropriate motive such as wanting to hire a head who might "fix" a narrow parental based issue such as sports, or will carry out their particular curriculum agenda, such as LD or gifted programs that would serve their own family's needs.

Thoughts on Search Committee Members:

To the extent it is possible avoid choosing anyone for either the search or an advisory committee who may have a hidden agenda.

Train ALL committee and advisory committee members, with the help of the search consultant, on appropriate questions and behavior towards candidates.

Remember that the professionalism of these committees reflects upon your school and is the first "voice" that the candidate hears.

## 11. Search Strategies

In one head search, the school was quite intrigued by a local candidate, currently a Development Director, who seemed to be a good fit with its profile. The search committee passed on one other qualified candidate in order to invite the local prospect for a visit. Once the local candidate's current school learned of his interest, it promised him the headship there, his ultimate real goal. He declined the invitation to continue in a search. The search consultant did not know the real motives of the candidate his firm presented, and the candidate who had been passed over was no longer interested. The board was furious at having "wasted" a pick, and the search consultant felt misled.

Thoughts:

It is imperative that three to five candidates remain engaged in the semifinalist stage and two finalists be kept in the loop until the first choice person agrees formally. On the other hand, continuing to look too long for the "right" candidate may lead to an aborted search or the loss of other good candidates who may wonder what is "wrong" with the school.

Conclusion

The search is a complex demanding process, but becomes far more complicated in some schools than others. The complexity is not based necessarily on the size of the school. We have seen small schools with clear cut needs experience a very difficult search due to highly sensitive cultures. We have seen large multinational schools with very sophisticated needs in their new head where the board chair firmly led the search process to a widely acclaimed



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choice.

The key steps in the process are simple, however:

1. Hire the right search firm (or conduct it in house but have a board member undertake it who has the time and instinct to do it well)
2. Establish an appropriate timetable
3. Develop an accurate, realistic and enticing profile
4. Form the search committee and establish the rules of the game for all players
5. Outline the communications strategies
6. Treat all candidates with respect
7. Ensure you do not lose strong candidates by dragging out the process or by not being up front and fair with all.
8. Sell all comers on the reasons why they should want to head your school
9. Be totally professional at all times
10. Ensure a successful and smooth transition by making transition a priority

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