

The Virtual Search

Making a leadership search work
when physical distancing is necessary.

As we've all found ourselves adapting to a new reality where physical distancing is necessary and travel is an increasingly complex scenario to navigate, the practice of interviewing talented leaders during a successful search process requires some necessary alterations.

That change does not mean that the process needs to be one of great compromise. Indeed, an entirely virtual search offers new benefits and opportunities such as cost savings related to decreased travel, increased access to candidates for staff and search committee members, and creative new ways to engage potential leaders for your organization. MCA has successfully navigated 100% virtual search processes and has become adept at making this sort of an experience rich and rewarding. This document is created to offer details on what to expect from a process that begins and ends entirely through virtual means.

What will be the same?

While it's true that a virtual search experience is different from one in which consultants, candidates, and

search committees meet and gather in the same physical spaces at key engagement points, many fundamental aspects of the search process remain the same as with a traditional process with in-person touchpoints.

The most important part of any search process continues to be the same whether conducted entirely in-person, virtually, or in some hybrid mode: **TO FIND AN EXCELLENT NEW LEADER FOR YOUR ORGANIZATION**. As MCA has adapted some of its procedures relative to search processes to accommodate safe social distancing and travel barriers, we've ensured that our clients are served in a highly comprehensive manner from start to finish of any executive search.

Fundamentally the sequence of engaging MCA as your selected search partner and confirming the selection of your new leader does not change, though because of certain new scheduling additions, the timeframe for a search process may be slightly extended. Standard practices in researching prospects, consultants interfacing with candidates, having conversations with candidate references, and even Round One interviews

with desirable candidates have been primarily conducted using video conferencing and telephone communications for some time.

The good news about this consistency is that as we've all had to make more of a move to virtual interactions, there has been an increasing comfort level from candidates in their level of engagement over video platforms such as Zoom. Some things have not only stayed the same but have in fact gotten better.

What will be different?

There are some key changes to anticipate with a search that is entirely virtual. To be best prepared for a successful outcome, here are some things to take into consideration about what might be and feel different:

THE LAUNCH

One of the biggest changes about the start of your search will be that the MCA consultant or consultant team that you work with will not be onsite with your stakeholders for research conversations and access to your physical spaces. Instead of in-person meetings, MCA consultants will schedule conversations with your search committee, staff, and other important stakeholders via Zoom and/or telephone.

To help the MCA team to fully understand your organization, it will be useful for a staff member or a member of the search committee to do a "virtual tour" of your venue and facilities (this doesn't need to be fancy, and can easily be done with a video walkthrough via smartphone).

CANDIDATE CULTIVATION

In reality, this part of the process does not change much. MCA consultants conduct extensive research through our active database of talented experienced and ascendant leaders and through outreach to our expansive network within the arts and culture field. Most of this work happens through deep data dives via computer, online sources, and phone calls.

From this research, MCA consultants go on to conduct extensive interviews with potential candidates via video conferencing and telephone conversations, vetting each recommended candidate thoroughly through the same use of technology.

CANDIDATE REVIEW AND DECISION FOR ROUND ONE INTERVIEWS

MCA has always maintained a preference to meet in-person with the search committee after submitting a written summary document that outlines a pool of recommended candidates so that a deeper discussion about these individuals can take place leading to a determination on which candidates an organization wishes to invite into Round One interviews. We have shifted to video conferencing for this step, but the level of conversation around candidates remains the same and the decision making process has not diminished in the slightest. For this step, you may expect that MCA will schedule a Zoom conversation with the search committee which will allow all members to login separately on their own device for a full discussion of the recommended candidate pool.

ROUND ONE INTERVIEWS

For several years, most MCA executive search clients have been conducting Round One interviews between candidates and the search committee via video, so this step has not changed in any substantial way. It is important to remember that Round One Interviews are typically only for the Search Committee and no additional staff or stakeholder participation. This is not a hiring phase, but rather a time for the Search Committee to determine which 3-4 individuals out of a typical recommendation pool of 6-8 candidates that they hope to introduce to a broader group for Round Two interviews. What is important to note again and what we've learned with the Candidate Review conversation and other engagement opportunities is that a much more successful conversation occurs when individual committee members login via their own devices, rather than gathering together in one physical space around a single video source.

At the end of Round One Interviews, the committee and the MCA consultant or team will meet once again via video to discuss which candidates will advance into Round Two interviews.

ROUND TWO INTERVIEWS

Round Two, or "the Finalist Round", does involve some additional coordination complexities due to the number of individuals that will need to be scheduled to speak with and engage candidates. It is important to think about who your organization wants to involve in Round Two Interviews from the outset of the search

process. Asking which staff members, Board members, and additional stakeholders should be tapped for conversations in this step earlier on in your process will help to avoid last minute scrambling to confirm the best participatory group. Again, all of these individuals coming into the interview process at this point will be speaking to candidates through Zoom or other video conferencing, and advance planning of this step will help to side-step any slow downs in the search process sequence.

Oftentimes, finalist candidates in at this point will be asked to prepare a written response and short presentation on a prompt that they've been assigned from the search committee (and facilitated by MCA). The goal of these presentations when done in-person has always been to emulate as closely as possible the communicative style of your possible new leader. Doing this assigned exercise in a virtual setting allows for new creative opportunity--candidates might pre-tape presentations, use screen sharing capability or other technology tools that allow them to showcase individual style and personality. At the end of the day, a live presentation via Zoom still works very well and is a good way to gain a greater sense of how candidates convey information in compelling and purposeful ways.

In Round Two, representatives of your organization will not only serve as evaluators of individual candidates and fit with the needs of your particular leadership opportunity, but also as ambassadors who can excite talented candidates about joining your community. For candidates who live outside your geographic area, it can be helpful for your search committee to create ways to showcase your community. Things like access to promotional videos, connection to realtors and housing resources, and even more casual conversations about what life looks like in your locale are very good ways to prepare candidates for what it might be to work and live in your community.

As you've planned with the MCA consultant or team in the early research phase of the search process, candidates will also want to have a "virtual tour" of your venue and physical spaces such as offices, housing, or storage facilities that your organization maintains. We've found that it is most effective for one person to film a taped walking tour while someone else narrates descriptions of the spaces being showcased. Many committees who have gone the 100% virtual

route for searches have reported that an unintended benefit of that shift has been the ability to schedule more conversations between staff, Board, stakeholders and candidates. Having individuals log on for 30-45 minute conversations with each candidate does provide for ample engagement opportunities, but it is important to remember that "Zoom fatigue" for candidates is a real thing. When working on the interview agenda at this stage, MCA will help to put together a schedule that allows maximum organizational participation with smartly planned breaks for candidates. In larger group conversations, it is also important to assign a meeting facilitator, someone who can moderate the flow of questions in a multi-person setting.

INTERVIEW RECORDINGS

The MCA Consultant leading your project will monitor your candidate interviews in Round One and Round Two as a non-video participant. That MCA consultant will also ask consent from each candidate to record interviews, which can then be shared with search committee members. That video recording of candidate interviews can be a valuable resource for side-by-side consideration of candidates as search committee members do their own review, or if a search committee member needs to miss an interview for some reason. Interview recordings are intended solely for the search committee, and access to those will be limited to individual members.

FEEDBACK MECHANISM

Once candidates meet with individual representatives of your organization in this step, MCA will provide an online means for feedback to be sent on impressions of each candidate. MCA will collect this feedback and present it to the search committee at the end of Round Two interviews so they may have that information as they make determinations on a hiring offer.

How can you best prepare now?

In a 100% virtual search experience the chief challenge that any organization needs to address is technological capability. Thankfully, that consideration does not require a large investment of financial resources, but a commitment of time and leadership helps make any process run smoothly.

Zoom has become a critical tool for MCA in our search process. Other video platforms work well (GoToMeet-

ing, BlueJeans, etc.), but when MCA coordinates scheduling of candidate or committee discussions, it will be done via Zoom.

When possible, it is best to assign someone from your search committee or staff to be a technical liaison for any committee members who need additional help or guidance using video conferencing. Your MCA consultant will be a resource for support and assistance with scheduling and video conferencing connectivity, but having a point person on your team to be your technology backup ensures that if challenges occur, someone close to your organization will be ready to assist.

When possible, it is helpful to do dry runs with your search committee of interview question sessions. It works well to assign individual questions to each committee member in preparation for a candidate interview. MCA will supply sample questions for all discussions, but tailoring who asks these questions will likely be something that your search committee chair can navigate well. Going into a conversation with a basic plan on who will ask which questions will actually allow for a much more organic conversation where there is a natural give and take between candidates and representatives of your organizations.

Also, remember to not let “perfect be the enemy of good.” As you consider creating videos of your venue and facilities, always work within the resources you have at hand to show clearly the physical spaces of your organization. Remember, most smart phones will be more than satisfactory to do the job, so you don’t need to burden yourself with concerns over capturing high definition video sources. Your goal in adding this element to a virtual search process is to give an overview of space and places you think will be important for candidates to know about.

Finally, since your time will primarily be spent talking to candidates over a screen, take a moment to consider the setting, sound, and lighting in which you’ll have your conversation. Speaking to candidates over video with good front facing light in a quiet room should be a priority. A simple internet search will also provide any user with a multitude of “how to” videos on curating a successful video conferencing setup for yourself without great investment of financial resources.

What else should we know?

While a search process that is 100% virtual can be extremely effective, we all know that there is no entirely comparable replacement for an in-person interaction with possible new leaders to work with your organization. Candidates who once were able to meet you in the same physical space must now talk to you from a space in their home that may have once been reserved exclusively for personal use and now has been retrofitted into a professional space that may be prone to a faithful dog or active child running through the background. Scheduling of candidate interviews can become more complex and intense relative to the size of your organization. And even in a time when each of us is being asked more and more to use video and audio technology for interpersonal communication, the reality is that some people just do better with video than others.

All of those reasons are a good reminder to embrace the idea that in shifting to a fully virtual search process, taking more time to let the process unfold in a comprehensive way will ensure an experience as close to (and in certain ways better than) a series of in-person interactions. The final pages of this document outline the specific steps in a virtual search process with some basic timeline assumptions to see how a sequence works from first engagement of MCA as your selected search partner to a confirmed announcement of your new leader.

The Virtual Search Sequence: Step-By-Step

RESEARCH PHASE (1-3 weeks)

1. Consultant gathers organizational information via email, file sharing such as Dropbox, etc.
2. Consultant interviews staff and search committee via Zoom or phone
3. Consultant writes Job Profile and gets approval from search committee, then posts on firm's and organization's website and lists with relevant online job posting sites.

RECRUITMENT (5-9 weeks - Artistic searches are generally longer than Executive/Administrative searches)

1. Consultant creates prospect list and reaches out to interesting possible candidate and nominators
2. Interviews scheduled with interesting candidates via Zoom
3. Consultant provides regular updates to search committee chair (usually every two weeks)
4. Reference calls made on top candidates
5. Consultant presents a Presentation Packet of 6-8 qualified candidates for search committee review that includes:
 - Full Job Profile for search committee reference
 - Written summary of how candidates aligns with defined priority qualities from Job Profile
 - Candidate Cover Letter
 - Candidate CV
6. Consultant and search committee schedule a 2-hour Zoom call to discuss presented candidates and make determinations on who to move forward to Round One Interviews

ROUND ONE INTERVIEWS (1-3 weeks)

1. 60-90 minute Zoom interviews are scheduled with selected candidates (ideally 5-8 candidates from present-ed list). Interviews can be handled in the following manner:
2. Consultant or organization "hosts" meeting and gives search committee and candidates login information. Elements to consider for this process include:
 - List of baseline questions for search committee to ask all candidates provided by consultant
 - Recording of all interviews for search committee follow-up review (or if a member of search committee can't participate in conversation)
 - Consultant observes interviews (muted audio and video off)
 - Ranking rubric to use in evaluating candidates
3. Search committee and consultant schedule a 60-90 minute discussion of candidates two-three days follow-ing final interview to discuss which 3-4 candidates to move into Round Two (Finalist) Interviews

ROUND TWO (FINALIST) INTERVIEWS (2-4 weeks)

1. Final Candidates provided with additional operational information on organization. Materials to include might be:
 - Current P&L and Balance Sheet
 - Last three years of financials
 - Current Development and Marketing Plans
 - Strategic Plan
 - Any relevant programmatic information
2. Final Candidates are given a "homework assignment" to respond to in advance of their conversation with the search committee. Things to consider for this exercise:
 - The goal for this exercise is to give each candidate the opportunity to respond more deeply to questions relating to their vision for leadership
 - Candidates can be asked to write up a 2-3 page response that should be submitted to consultant 2 days prior to conversation with search committee so that consultant can distribute to committee members

ROUND TWO (FINALIST) INTERVIEWS (continued)

- Candidate should be prepared to talk about their response either *LIVE* or *RECORDED IN ADVANCE*. A note on those scenarios:
 - * **LIVE:** Candidate uses the first 10-15 minutes of their conversation with the search committee to present their ideas. Could include any visual presentation candidate may wish to share via Zoom.
 - * **RECORDED IN ADVANCE:** Candidate makes a video presenting their response to the assigned prompt and shares with consultant and search committee prior to scheduled conversation.
- 3. Staff from the organization creates a “walking tour” of the organization’s physical space. Things to consider for this are:
 - One person can film the “walking tour” using a phone or tablet for video while another person narrates
 - Show as much of the active physical spaces as possible (performance, gallery, gathering, offices)
 - Video file should be shared with consultant who will share with final candidates
- 4. **STAFF INTERVIEWS:** All final candidates should be scheduled for interviews with staff. Things to consider:
 - As much as possible, one-on-one 30-minute interviews are useful
 - Group interviews are fine, and make sure that each participant logs in separately on their own device
 - These are best scheduled by an individual from organization working with all staff scheduling concerns
 - Consultant will supply sample questions for these conversations
- 5. **ADDITIONAL KEY STAKEHOLDER/TRUSTEE INTERVIEWS:** Final Candidates may also have conversations with additional key stakeholders/trustees if the organization feel this will be useful to the search committee’s evaluation. These can be a handful of 30-45 minutes conversations with current trustees, major donors, emeritus trustees and founders, or others.
- 6. **SEARCH COMMITTEE INTERVIEW:** This is a 2-hour conversation between all final candidates and the search committee. Things to consider for this final interview step:
 - As in all group interviews, each participant should login separately on a dedicated device
 - The conversation can evolve from reactions to each candidate’s “homework assignment”
 - Consultant generally will provide areas to explore with each individual candidate that have emerged from earlier discussions, as well as sample questions for a deeper conversation
- 7. A ranking rubric is provided to search committee by consultant that provides an opportunity to see individual candidate alignment to Job Profile qualities and qualifications
- 8. Feedback is collected from all **STAFF** and **ADDITIONAL KEY STAKEHOLDER/TRUSTEE INTERVIEWS** for search committee review. Things to note for this element:
 - Consultant provides an online form to collect responses
 - Participants can respond anonymously to the survey
 - Responses are received by consultant and then shared with search committee
- 9. Consultant and search committee schedule 60-90 minute meeting to determine candidate selection (a minimum of two days after final feedback is delivered to search committee)

OFFER AND ONBOARDING

1. Consultant extends offer to selected candidate. Offer includes:
 - Annual Salary
 - Full breakout of benefits (including PTO/Vacation information)
 - Relocation expense reimbursement
 - Start date
2. Negotiated final offer accepted by candidate
3. If necessary, full Board approves search committee
4. Candidate is presented an employment agreement by organization
5. Candidate onboards either virtually or in-person when possible
6. Consultant serves as a resource during transition period