

# BAKER AND ASSOCIATES LLC

## MEMO

To: University of Mary Washington Presidential Search Advisory Committee (PSAC)

From: Martin Baker and Matt Cullinan

Date: June 29, 2015

Subject: Presidential search

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Please see below a draft of the timeline for our search, thoughts on the search process and model, as well as potential places to look for candidates.

## TIMELINE

### Planning and Preparation: July and August

- July 21<sup>st</sup>: Consultants visit campus to meet with the PSAC for kick-off meeting. Agenda includes introductions, search process overview, and discussion of leadership qualities of the new President. During this meeting, we will also look at establishing dates for future committee meetings throughout the fall.
- August 5<sup>th</sup>: PSAC follow-up meeting.
- August 7<sup>th</sup>-8<sup>th</sup>: Consultants participate in the Board of Visitors retreat in Charlottesville. Consultants will meet with the Foundation Board, members of the Cabinet, and Board of Visitors.
- Late August/Early September: Consultants visit campus to meet with stakeholders, including hosting open forums to gather feedback from faculty, staff, students, alumni, and community members.
- Expanded job specification is written, submitted, and approved by the University.
- Develop search strategy.
- Encourage nominations from members of the PSAC, as well as from the campus community at large.

### Recruitment of Candidates: September and October

- Utilizing our existing connections, relationships, and extensive database, in conjunction with original research, identify appropriate individuals to contact to ensure there is a diverse pool of highly qualified candidates.
- Contact prospective candidates as well as network with those individuals in positions to act as sources of information.
- Develop candidate pool.
- Consultants screen candidates through in-depth telephone and/or personal interviews.
- Present candidate status reports to the search committee.
- Create secure website with candidate materials for the search committee to review.

### Candidate Review and Interviews: November

- Consultants meet with the search committee to review candidate materials. Search committee narrows down the list of candidates to a group of semifinalists.
- Consultants work with search committee to develop interview screening instrument.
- Consultants work with search committee to develop list of questions for first round interviews.
- Search committee conducts first round of confidential, off-site interviews with selected group of semifinalists. Committee members should be prepared to commit at least two full days for these interviews. Baker and Associates LLC will coordinate the logistics for committee members and candidates.

- Search committee meets to narrow down lists of candidates to a smaller group of finalists.

### **Campus Visits and Successful Completion of Search: December/January**

- Formal background checks and final references are conducted.
- Finalists visit Fredericksburg for second, in-depth interviews. Depending upon search process (open, closed, or hybrid model), these interviews may need to be held off-site for confidentiality purposes.
- Possible third round “hometown” visit and interview with final candidate(s).
- Any additional reference checking and possibly behavioral assessment conducted.
- Search Advisory Committee makes its recommendations to the Board of Visitors.
- Board of Visitors selects the 10<sup>th</sup> President of UMW, formal offer is made to selected candidate.
- Board of Visitors announces the new President.
- Successful conclusion of search.

### **Presidential Transition and On-boarding**

- July 1<sup>st</sup>, 2016: Start date for new President.
- Formation of Presidential Transition Committee to assist the new President in getting acclimated to new role and community.
- Baker and Associates LLC will conduct a process review at 30, 60, and 90 day intervals after the President starts to ensure a successful transition.

## **SEARCH PROCESS-OPEN, CLOSED, AND HYBRID MODELS**

There are a number of different models in which to conduct a search at this level. There are pros and cons to each model, and it’s important to decide early in the search which model to use.

**Closed search:** A closed search is strictly confidential and protects the identity of candidates. Therefore, there is no exposure to individuals outside of the selection committee. This process increases the probability of having sitting Presidents, or other high-profile individuals in the pool. Sitting Presidents most often can’t risk their relationships on their home campus, particularly with their Board and donors. Furthermore, they lose the trust of their colleagues on campus and the question of their commitment to that institution comes to surface. While this process increases the probability of a stronger and larger pool, it eliminates the participation of faculty and staff outside the committee, and therefore, they are not able to share feedback and knowledge of particular candidates.

**Open search:** An open search exposes candidates to those on campus, but also the public-at-large. It allows greater participation from those on campus, including open forums and smaller group meetings. It also allows for feedback from those on campus, allowing them to participate in discussions and provide feedback to the committee and Board. This process opens up the level of scrutiny candidates will receive, rightly or wrongly. This model is usually favored by faculty, staff, and students as it is consistent with the traditional search process used for most all other positions on campus. However, given the public nature of this model of search, many sitting Presidents, as well as some Provosts and Deans, will not participate in open searches. They are not comfortable jeopardizing their current success and strong relationships they have at their home institution. Furthermore, this method often gives an advantage to the candidate who can perform best in a public venue, which may not be the characteristic that is most needed in the presidency.

**Hybrid Model:** The hybrid model takes the best pieces of an open search and a closed search to create a model that will provide confidentiality to candidates, but allows participation from various stakeholders outside of the committee in a controlled environment. In this case, there are no open

forums with the candidates, and their names are not publically announced. However, select campus representatives have the chance to meet with candidates and provide feedback. Most often, these groups include the Presidents cabinet, the academic leadership team (Deans), representatives from faculty senate, representatives from staff senate, and representatives from student government. Candidates often will take a private tour of campus, allowing them to also further understand the climate on campus.

## Targeted Recruiting Strategy (Food for Thought)

