

# COURTING SUCCESS IN SENIOR HIRING AT CANADIAN UNIVERSITIES

Alex Usher, Collin Macleod, and Linda Green



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Higher Education Strategy Associates (HESA) partnered with Stoakley-Dudley Consultants in this research investigation of the factors associated with good outcomes in senior university administrator hiring. HESA (formerly the Educational Policy Institute, Canada) is a company dedicated to providing institutions, governments and related agencies with strategic advice on a range of issues related to improving quality and quality measurement in higher education. Stoakley-Dudley Consultants is a professional search firm dedicated to advancing good practice while expanding its scope of service in health and education.

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## **INTRODUCTION**

Universities are complex entities. They are places of learning but far more than just schools; they are places of discovery but far more than mere labs. They receive public funds and must be publicly accountable but are responsible to boards which by and large are free of government membership. They are diverse communities, pursuing multiple goals simultaneously and answering to many different stakeholders who may disagree fundamentally about the institution's basic meaning and purpose.

They are, in short, unbelievably difficult to manage – and finding candidates qualified to manage them at a senior level is becoming more difficult all the time. Turnover in senior university administrative positions appears to be rising, and it is increasingly common for university leaders not to complete a term, let alone continue on and be renewed for a second one. Yet with mounting budget challenges and increasing global competition for academic talent, the need for qualified university managers has never been greater.

To date, there has been very little research or evidence available on the subject of university management in Canada. This is surprising, because senior university administrator searches require a significant outlay of university resources. These include the time and effort of stakeholders who participate in the process, significant expenditures on screening and wooing candidates, and the cost of services provided by external search firms. It is generally agreed that search firms are an essential part of the process today, since searches increasingly necessitate the scouting of external and non-traditional talent.

It is important for searches to yield the best possible results not only due to the expense but also because of the stakes involved in senior university administrator hiring. The future of a university may depend on its ability to attract and secure the talent required to take it forward and make the adaptations necessary to respond to changing global and local economics, demographics, labour markets, and accountability pressures. Senior hiring is therefore an area in which universities need to be extremely mindful of outcomes. Identifying practices that can improve outcomes is of considerable importance.

This paper reports the findings of a qualitative research investigation that was conducted jointly by Higher Education Strategy Associates (HESA) and Stoakley-Dudley Consultants. HESA is a company dedicated to providing institutions, governments and related agencies with strategic advice on a range of issues

related to improving quality and quality measurement in higher education. Stoakley-Dudley Consultants is a professional search firm dedicated to advancing good practice while expanding the scope of its service in the areas of health care and education.

The aims of this research were to identify factors associated with good outcomes in senior university administrator hiring in Canadian universities and to gather information about best practices where these could be identified. The content of the paper is based on the experiences and recommendations of senior university administrators with a decision-making role in senior administrator hiring.

More specifically, the findings reported are based on content analysis of key informant interviews with 31 senior administrators employed in a variety of senior administrator roles at 24 universities in eight provinces across Canada (see Table 1 in Appendix A for a breakdown of participants by province). Interviews were conducted with informants in four G5 universities,<sup>1</sup> eight large-size universities with medical schools, eight comprehensive universities, and 11 new or small universities. Informants held various positions, including president (three), provost (eight), vice-president (eight), secretary (one), dean (nine), and other roles, including director (two). About one-quarter of participants held dual administrator roles.

The findings that emerged from our interview process are presented and discussed in the following four sections. In Section 1, we discuss the views of senior administrators with respect to what constitutes a successful hire. In Section 2, we provide a brief discussion of interviewees' views about the major trends and current challenges in senior university hiring. In Section 3, we walk through the individual elements of the hiring process and highlight the risks involved at each stage, drawing on interviewees' narratives about their experiences of successful and not-so-successful hires. In Section 4, we provide a summary of the most prominent themes and findings and look at the interrelationship of various factors contributing to a successful hire.

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<sup>1</sup> "G5" is the collective term for Canada's five largest universities, all of which are research universities ranking among the top universities in the world.

## **SECTION 1: DEFINING SUCCESS IN HIRING**

What defines success in hiring? At the most basic level, success can be framed as the ability to find a candidate who meets the criteria of a position and comes to an agreement with respect to salary and working conditions. While universities do not normally track statistics on hiring processes, informed respondents indicated that between 75 and 90 percent of all hiring processes succeed when the goals are defined in this fashion.

The reasons for failure at this level are varied. Sometimes, search committees cannot identify or agree on a good match to the requirements of an opportunity. A committee may also be divided with regard to their choice of top candidate, and there may not be a consensus for the second-best choice. When a committee is split, the search is sometimes put on hold. And in some cases, although not often, the top candidate backs out late in the hiring process; at this point, the search may have to be started again from scratch, or a temporary internal appointment may be made and the search resumed later.

If, however, a more stringent definition of success – such as “hiring individuals who maintain a high level of performance over a number of years,” “hiring individuals who can drive change or improvement within an institution,” or, for senior positions, “hiring individuals who are renewed for a second term” – is used, then reported rates of success tend to fall considerably. When asked to measure success using a more stringent definition, participants gave a wide range of answers. One informant, for example, reported a 60 to 70 percent hiring success rate when success was defined to mean an individual is “functional in the position, has brought people along, has made some successful change that is beneficial but has a long-term vision, and is responsive to how the university is wanting to move.” Roughly one-fifth of informants, irrespective of university size and type, stated that when a more stringent definition of success is applied, their university’s success in senior administrator hiring was at best only 50 percent. At one large institution, the reported success rate was 33 percent.

Variation in hiring success rates for specific administrator positions is related to challenges of recruitment and retention. Informants reported that non-academic positions such as vice-presidents of human relations, administration, finance, audit, external affairs and development tend to be the most difficult to fill. But provosts and deans of professional schools were also reportedly difficult positions to fill. As well, turnover in many positions has increased.

Everyone below the *presidential rank is in decreasing order of likelihood to leave. So the highest would be fundraisers, then external or public affairs people, then potentially the VPs in research and provosts, and then the rest are pretty stable. I think deans in general are stable for five years, but the renewal rates might fall off.*

With regard to dean positions, there were reports of more frequent turnover and less frequent renewals than in the past. Deans are less often being retained for a full term. Higher levels of turnover among associate and assistant vice-presidents, vice-presidents, and presidents were also noted by informants. It was also stated that it is less likely for senior administrators at higher levels (e.g., provosts) to be promoted internally after a term.

*Being a provost is a tough, tough job. After one spends five years as provost in an institution making tough and unpopular decisions, I think there is a tendency to then want to look elsewhere for a president. There's something invigorating about moving to a new institution as well.*

Respondents also reported that there has recently been an increased level of turnover in the most important position of all: president. University presidents today spend a lot of their time and effort on fundraising, a priority which may not be understood or shared by the rest of the university.

*Presidents are pushed to the brink of breaking themselves to raise money for the institution. In that context, they have to answer to the collegial system. The collegial system will ensure that if enough people are unhappy, that system will do the administrator in. Because faculty do not have as much interest in those larger issues, they are not interested in big funding campaigns. At the bottom line, they want to do research; they want a good laboratory or a quality faculty.*

Leadership that does not respect institutional politics can be the undoing of presidents. The collegial style of governance in universities – that is, the fact that the priorities of the university may be understood differently by different constituencies – means that presidents often need to use suasion to rally academic staff around a vision. Presidents that are too quick to make solo decisions in an executive decision-making manner can raise hackles among faculty and create a situation where change becomes very difficult to manage. Boards of

governors, sensitive to the university's image, often see this kind of conflict as unnecessary and may punish presidents who act in this manner.

One informant described the role university boards can sometimes play in university presidential turnover.

*There have been some spectacular [president] failures. And part of that has to do with the [...] presidential appointment involving a board which, for the most part, doesn't understand academic culture. And with the recent increase in accountability with respect to Enron and the like, boards are far more [sensitive to] their accountability responsibilities, and if things aren't going the way they should, they tend to be a lot faster to react than they used to be. My instincts there are that because boards don't fully appreciate the culture, they may not bring in the right person.*

It was generally agreed that the relative success of a hire can take some time to become apparent. Because of the relatively slow pace at which universities tend to move, as a rule of thumb a senior administrator's effectiveness can only really be gauged after two or even three years in the position.

*There is a saying [... that] "in the academy it takes three years to be an overnight success," and this is especially true if you have come from outside [the institution]. In the first year you are developing an understanding of the university and building relationships, in the second year you are understanding the full potential of the job, and in the third year you start thinking outside of the box, you get creative.*

*I would define a success as someone who completes a minimum of three years and if how they are judged at the end would make you want them to continue. They would no longer be working in crisis mode, they would be working on strategic planning, they would have good relations with [...] various constituencies, they would have gained traction, and they would be making a difference.*

Clearly, success in senior hiring at universities is not something that can be judged quickly. Partly, this is a function of the complexity of the various jobs – there are so many different facets to the position of dean, vice-president, or president that incumbents are simply not put to the test on all of them right away. Even when they are put to the test, the nature of the university as an organization means that results are often not seen for some time.

Given all of this, what constitutes a good hire? Ultimately, to be judged successful in a new role, the incumbent must be able to make a decisive impact early in his or her tenure. This usually means forging key alliances with staff and faculty early on; being able to articulate a vision for his or her unit within the organization (or, in the case of very senior management, to be able to clearly articulate the challenges the institution faces and a vision of how to meet them); and having the foresight to identify problems in advance and the ability and charisma to effectively manage and move past those issues while remaining focused on the larger agenda and vision. This is a tall order even in the best of times; in challenging times such as the present, finding people with the required qualities is, as we shall see, even more difficult.

## **SECTION 2: CURRENT CHALLENGES**

Being a senior administrator at a university is a challenge. Funding constraints such as those often seen today tend to make success much more difficult to achieve, because of the tensions and conflicts that arise from the need to make tough budgetary choices. The difficulty of the job is part of the reason why good candidates for senior administration are in high demand and also why good candidates are reluctant to come forward.

Beyond the problem of financing, there are two key factors driving the current difficulties in university hiring. The first is the increasing professionalization of universities themselves. Senior jobs are becoming more technical and require more specialized skill sets. The second is the shrinking talent pool. Universities in Canada have for the most part neglected succession planning over the last two decades, so the pool of internal candidates who are prepared and willing to take on – and remain in – senior university administrator roles has been greatly reduced. This is especially the case at the dean level, but shrinking candidate pools have necessitated increased recruitment of candidates from outside academia at all levels of senior hiring, with mixed results.

### **PROFESSIONALIZATION**

It is generally acknowledged even in the best of times that universities are highly complex institutions with very large budgets to manage. University management has always been understood to be challenging, but this has never been more the case than now. The global economic recession has deepened the financial challenges facing Canadian universities.

Discussion with informants about successful senior hiring tended to focus on a number of essential leadership criteria. These included people skills, management or administrative ability, institutional analysis, and strategic planning. People skills are indispensable in good university leaders. As one informant stated, “Universities are enormous communities that are very, very loosely guided by senior administrators, who have very little power compared to the private sector. It becomes vital to be seen as part of the community, as fitting in, and as having supporters.”

Support from the university community is related at least in part to administrators’ people skills and leadership style. Leadership style and an understanding of university culture are critical if university leaders are going to successfully challenge the culture, which many informants indicated is something

universities are looking for – and need – today. “The biggest difficulty right now is we face enormous challenges,” said one participant. “In these circumstances, it’s crucial that we don’t surround ourselves with people who think like us.”

Today, university leaders must also be able to respond to changes taking place outside the university. “In the president’s role, you also need to have some knowledge of the political system, some knowledge about how politicians and the community work,” noted one interviewee. Universities must be able to adapt to global-level changes. As an example, one informant stated, “Take the Copenhagen meetings on the environment taking place right now [...] A shift could be coming based on what is decided there; we may need to develop training to address climate change.”

Age was mentioned in the discussion of essential leadership attributes. Some informants said universities should be – and in the next decade will be – hiring younger candidates, because youth brings more energy and may be better able to help universities adapt to current cultural and economic developments. However, other informants expressed the view that there is a generational difference in the work ethic of younger people. “Young people don’t want to work in the way we are working,” remarked a participant. “I don’t think they see themselves as committed to institutions, whatever the sector.”

It was also noted that university leaders must be forward- rather than backward-looking, since the circumstances in which universities operate have changed.

*The university in 15 years won’t look remotely like what it looks like today, just as it doesn’t look like it was 15 years ago. The public education system is at risk. If we don’t look creatively, we’ll be making decisions like we were ten years ago.*

One informant emphasized the importance of a quantitative orientation in university leaders with the following comment: “Can the person add? That would be a help.” Another discussed the importance of this in relation to the challenges deans face today, stating that, “A successful dean will be able to present the needs, challenges, visions, and plans using institutional analysis – that is, by comparing with other schools, perhaps with other countries, by bringing forward statistics and numbers to predict the future.”

*[Senior administrators] without a science background have been less effective. It’s potentially a difference in cultures between arts and science. Arts tends to be a bit more democratized. Science follows a*

*pathway. You have to pay attention to budget, money, and time. You have to make decisions; everything marches to a budget clock in the sciences. For example, my laptop was bought with research funds. In arts, faculty expects and waits for the university to pay. There [is] a series of expectations waiting to be met. There are little or no consequences if a tenured professor is unable to get SSHRC grants. It might take two to three years. Not getting grants is not acceptable in the sciences. It's monitored. It's much more research-focused. That's part of the measurement. A bit of a trend, however, is the fact that those who are younger in the arts are going after grants more. Their objectives may be slightly different.*

University hiring may be struggling, as these comments seem to indicate, to keep up with the management requirements of university leadership positions.

*These institutions are more and more complex to manage. People are not hired because of their management skills but because they are smart and excellent in their discipline. As universities become bigger, they become more complex to manage. And [...] our universities are not funded sufficiently. So much wealth is going into health care. University is finding ways to do more with less. As a society we are more complex; there is more demand and fewer resources. The universities were built at a time of significant economic expansion. The whole world is becoming more competitive. Universities are now competing with universities around the world. Universities must be able to plan strategically, to measure what you are doing, to determine where you are going, to determine what resources will get you there, and there is less time to achieve and to make decisions about all this.*

Informants told us that senior administrators at all levels are increasingly occupied today with legal and financial issues, including budget management and fundraising. More and more, senior administrator positions are being filled by non-academic candidates with business management experience recruited from outside the higher education sector. This is a departure from the historical pattern, in which senior administrators rose through the university ranks.

Accordingly, there is reportedly less emphasis on strong academic backgrounds and more hiring of candidates who do not have a Ph.D. Hiring from other sectors is more common in non-academic senior roles, such as vice-president of finance and administration, student affairs, external affairs, or government relations.

Candidates are being recruited not only from private industry but also from NGOs and government.

*This is an academic institution, but it's also a massive business with an operating budget of \$1.whatever billion. You cannot run that with a bunch of folks who have never had any proper business experience running large corporations and managing massive amounts of money. So, let's get serious about having people who really have the expertise – not an academic who may have written about it and researched it, but actually somebody to do it. And it's the same thing with government relations. How do you develop better links to federal, provincial, municipal arrangements? Well, you have to bring people in who have worked on the other side. And so, we need to be looking for very particular skill sets for particular kinds of roles.*

Many authors, such as Amanda Goodall in her recent book *Socrates in the Boardroom*, have noted that universities are becoming increasingly professionalized.<sup>2</sup> This trend is in part being driven by the increasing emphasis in large universities on achieving “world-classness.”<sup>3</sup> “World-classness” requires a high degree of research output, since research is the primary determinant of global reputation, and the ability to attract sufficient external funding to enable this research output. Both require new bureaucratic and managerial structures in order to raise and spend funds effectively.

One of our informants predicted that in future the “faculty-centric focus of universities will be challenged.” This shift to greater hiring of non-academic or non-traditional candidates from sectors outside post-secondary education was discussed by informants in relation to the increased emphasis on public accountability.

*While you want to be true to your mission as educators [and as] the creators of knowledge through research, I think there's an increasing sensitivity at universities across Canada that we have to be a lot more accountable. That's actually because we're almost exclusively publicly funded institutions, and so I think the public is demanding a lot more and governments are getting a lot more accountability. And because of that,*

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<sup>2</sup> Goodall, A.H. (2009). *Socrates in the Boardroom: Why Research Universities Should Be Led by Top Scholars*. Princeton, New Jersey: Princeton University Press.

<sup>3</sup> Salmi, J. (2009). *The Challenges of Establishing World-Class Universities*. Washington, D.C.: The World Bank.

*it can't be the Ivory Tower closed shop that it traditionally was, going back 20, 30, 40 years.*

In response to these demands and the expectation that future demand for higher education cannot be taken for granted, universities are looking for a different kind of candidate.

*[University administrators must be] excellent at community relations with government, the private sector, community, and employers. Government needs to be convinced that what the university is doing is worthwhile, the private sector needs to be convinced to invest, parents need to be convinced their kids are being well served, [and] employers need to be convinced that graduates are being trained and are work-ready.*

### **SHRINKING CANDIDATE POOLS**

The hiring of senior university administrators in Canada is occurring against a backdrop of increasing challenges. A widespread trend is the shrinking pool of internal and academic candidates capable of taking up senior university administrator positions. Some informants stated that there is also less quality in candidate pools today. This is a serious problem for universities, since it is generally believed that the richness of candidate pools is a determinant of successful hiring.

Several factors were prominent in informants' explanations of the shrinking pool of high-quality candidates. First, many senior administrator positions in universities are perceived as stressful and unrewarding in the current economic situation. Individuals who assume those leadership roles are now likely to spend more time on administrative duties, including fundraising and budget-related activities, than they would have in the past.

Growth in universities based on student enrolment and research funding can be uneven. This is a source of growing internal tension in universities. Senior administrators are much more likely today to be required by circumstances to make difficult and unpopular decisions about how to allocate limited funds. It is more difficult to be an institutional change agent when resources are scarce than it is in times of economic growth and rising demand for post-secondary education.

The reality of management demands in today's universities affects the size of candidate pools in university hiring. As one informant said, "Deans are expected to be more like business managers. I have many colleagues who see themselves

as business managers. That's not how I see myself." Another stated that the perspective of many academics is that "I would rather take a sabbatical every six years, teach, do some research and go to conferences that deal with the area that I spent [my] life researching, as opposed to wonder[ing] about how I'm going to tell this department they can't replace this retiree, or how I'm going to try to get more students into fewer classes because student numbers are increasing but budgets are going down."

It has become more common in some schools for several senior roles to be combined. A vice-president may have responsibility for more than one faculty. A provost may also assume the role of vice-president. In such cases, the challenges are multiplied. Not surprisingly, under such circumstances, fewer academics are interested in senior administrator positions.

There are other reasons for the limited supply of internal candidates to assume senior university administrator roles. Informants explained that natural hiring cycles have been complicated by many rounds of government funding cuts and budgetary restraints. Due to a decade-long period in the 1990s when hiring and advancement within universities were limited, fewer academics today are experienced in administration, and there are fewer tenured individuals in mid-career who can be brought forward as potential candidates for senior administrator roles.

*There were a number of years when academics were not getting hired at Canadian universities at all. There wasn't the progression along tenure track to department chairs [...] Now, as a result, candidates may be older and in earlier stages of their careers, or it may be they went to [private] industry for a while. Now we are pulling people from industry and government sectors. The early warning system for me is this – we are always looking for people to serve on senate committees. They must have tenure and be mid-careers. There are fewer of them [now].*

Many of those who earned Ph.D.s during this prolonged hiring hiatus left the university sector to do work in other settings such as private consultancies, corporations, or NGOs. Today, as many as 70 percent of faculty at some institutions are new hires (i.e., within the last five years). Although younger candidates are perceived as more likely to act as the change agents universities are looking for today, fewer are prepared to assume these roles.

These are some of the factors that account for the increasing reliance on external candidate pools in senior university administrator hiring. The global recession and slow real estate market are other factors that further contribute to the limited supply of candidates. Although there is more mobility in the senior university administrator workforce for the reasons outlined above, individuals are reportedly more reluctant than in the past to sell their homes and move. This is less true for recruitment of candidates in American universities, however, where the recession has resulted in layoffs and led to more American academics and administrators considering positions north of the border in Canadian universities.

### **ANSWERING THE CHALLENGE**

The twin challenges of professionalization and shrinking talent pools have put universities in a serious bind. At the very time that increased skill levels are needed, the number of people interested in and available for administrative work is decreasing.

The basic remedy here is for all institutions to work actively at widening the talent pool. This involves two tasks. First, it means being prepared to open up certain jobs on campus to people from positions outside universities. Obviously, this is not an option for all jobs – there is no real reason, for instance, to hire deans or vice-presidents academic or research from outside academia, as it is hard to see how outsiders could be effective in these jobs. For nearly every other position, however, smart institutions will be prepared to look both inside and outside academia in order to access the broadest possible talent pool.

The second task is taking steps to actively widen the talent pool *within* campus. As already noted, the long hiatus in hiring during the 1990s interrupted the normal flow of talent into the junior administrative ranks. This means that there is a kind of demographic gap opening up on campus. Closing it means finding ways to actively provide experience and training to people on campus who may at some point in the near future become interested in joining the administrative ranks. Partly, this involves professional development; partly, it means deliberately providing younger academic staff with committee and task force chair experience. It also means offering department chairs to younger staff. Undoubtedly, this strategy will have its risks – putting less experienced staff in these positions is bound to entail some missteps here and there. But the widening of the talent pool should pay ample dividends with regard to the long-term good of the institution.

## **SECTION 3: THE A-Z OF THE HIRING PROCESS**

Canadian universities employ a fairly standard approach to the hiring of senior administrators. A great deal of emphasis is placed on the hiring process, because good practices in senior hiring are understood to be significant determinants of successful outcomes. Beyond getting the various elements of the process right and avoiding pitfalls, it is argued that the more structured the process, the more likely it is to succeed.

In general, the steps of the search process are as follows: i) a selection committee chair is selected, ii) a committee is struck, iii) the decision to hire a search consultant is made, iv) search criteria for the position are defined, v) the position is advertised, and vi) the candidate pool is identified. Once these steps are done, the process continues: vii) interested candidates are screened, viii) a long list of candidates is generated and presented to the committee for discussion and rating, and ix) a short list of candidates is generated and screened more intensively. The last set of steps may be repeated until a final short list of the most suitable candidates is identified. Finally, a candidate is selected, an offer is made and negotiated, and – if all goes well – the result is a hire.

This, at least, is the theory. In practice, much can go wrong along the way. In the following sections, we will draw on the wisdom of our informants to help understand the pitfalls of the hiring process in universities and what can be done to avoid them.

### **THE SEARCH COMMITTEE**

Search committees play a key role in senior hiring in universities. They reflect the structure of power and democratic organization of universities. A search committee is used in many but not all new senior hires. In some universities, as a rule, a committee is struck for almost every new senior administrator hire. Search committees are typically multi-stakeholder groups that are intended to be representative of the range of university constituencies.

Committees typically have 12 to 16 members, depending on the university; in larger schools, they may be comprised of as many as 26 members, including representatives of faculty, students, the board of governors and senate, and the local community. Representation of public stakeholders on the committee is seen as important, since these stakeholders' perspectives can often help broaden the priorities considered in hiring.

The search committee's composition, along with the identity of the committee chair, may be predetermined by the university's constitution, collective bargaining agreement, or other regulations. In some universities, the identity of the committee chair will be determined based on the faculty or on the particular position to be filled. For example, the committee chair for a vice-presidential search would be the president, and for a presidential search it would be the chair of the board.

On the one hand, broad representation is important to help ensure that the candidate selected will be accepted by the university, since "power is more diffuse in a university" and things get done based on collegial relationships and suasion, rather than a command-control approach. Academics strongly defend this arrangement, since part of what is at stake, ultimately, is academic freedom.

A large majority of senior administrators interviewed for this research endorsed the broad-based committee approach used in university hiring because it is a means of achieving buy-in from the university community. This was considered essential to an individual's ability to succeed in a leadership role. Some informants also expressed the opinion that the committee process is a critical part of university life, since it engages various constituencies in decisions about the priorities and renewal of the university. Search committees are expected to employ an open consultative process based on consensus-building that works toward a shared vision.

There are disadvantages to fixing the composition of search committees, according to some informants. A small minority took the view that the committee process is too cumbersome and not specialized enough to ensure successful hires. One of these informants argued that mistrust is institutionalized in universities.

*It is not senior hiring that is the problem, it's the administrative structure, which is based on institutional lack of trust; it takes way too long to make decisions, and the government adds another layer. If you were running any other institution than a university, you'd be broke.*

Sometimes informants stated that search committees serve as vehicles for faculty members to stop or reverse the direction of changes that have been introduced by university leadership, as the following account mentions.

*There are problems inherent in the selection procedures, in the formal structures. One of these is the committee selection process. This situation is an example: an exiting dean had taken on some issues during his*

*tenure. The selection committee to select the new dean was stacked with faculty representatives who were voted onto the committee to make sure that it didn't happen again.*

One informant commented, "If you have a radicalized faculty element on the committee, there can be confusion and competing agendas within the search committee agenda." Committee members are in effect asked to do double duty – that is, to represent their own constituencies and to act on behalf of the interests of the whole university.

*Board members, who may represent nonprofits, business, [or] community leaders, are given specific training so that they can represent the interests of the university. Faculty members on the committee represent their own constituencies. It is important to talk to them about this [i.e., the importance of representing the university's interests] but it's very hard to make a change.*

Search committee members tend to be accountable to and to act on behalf of the interests of their particular faculty or constituency group, rather than the university as a whole. This is reinforced by the fact that, as one interviewee said, "All [committee members] will be lobbied by their colleagues." One informant reported that the university is having greater difficulty finding individuals willing to serve on search committees. The challenge of balancing competing priorities and interests is an ever-present reality at today's universities, so it is not surprising that it is having an effect on university search committees.

Search committees do not typically make the final determination in hiring. Rather, they bring a recommendation forward to the board of governors, president, or vice-president. Although the final sign-off is often a formality, there are also circumstances in which a president or vice-president's final determination will differ from that of the committee.

The leadership role assumed by committee chairs was considered critical to the ability of committees to engage in consensus building. Committee chairs must be able to facilitate the consensus-building process. They instruct the committee with regard to process guidelines, roles, and responsibilities and reinforce these as needed. Senior administrators who act as committee chairs are likely to have developed a list of strategies based on experience that they find are helpful to the success of committees and hiring outcomes.

At some Canadian universities, after the committee completes its work, the final determination is made through a vote. The vote may involve the members of a specific faculty – e.g., in the case of hiring a dean. In other cases, a public meeting is held by the board, the search committee’s recommendation is put forward, and nominations may be accepted from the floor. Participants did not favour voting as much as the other elements of the university senior hiring process. For instance, in some schools, applications to renew are put to a faculty vote. One informant reported that “in one school, only 20 percent [of the faculty] ever voted, which meant that just over ten percent of faculty could determine the extension of a term.”

As the foregoing shows, search committees are not necessarily disinterested bodies; in fact, at campuses that are particularly polarized, each search committee functions as a sort of battleground for competing factions, each trying to put someone meeting “their” criteria into a vacant position so as to help promote their own vision of the university. While this unfortunate tendency may be inevitable given institutional governing structures, its pernicious effects can nevertheless be curbed in two ways. The first is to ensure that the person to whom the new hire is ultimately responsible is either part of the committee or has a very large say in the job description and drawing up of a list of desirable characteristics for the incumbent. The second is to shrink the size of the search committee; more focused committees may not represent quite as broad a segment of the institution, but they are likely to be more focused on their task, which should lead to a more successful hire.

### **USE OF SEARCH FIRMS**

It is now increasingly common for universities to use search firms, especially for external searches, from the highest-level positions down to the department head level. As one informant observed, “This just demonstrates that all searches are becoming more difficult to execute successfully.” Some smaller schools rearrange their budgets to find the funds required to hire search firms to conduct national searches. Some schools use search firms some of the time, while others rely on them to conduct all of their national searches.

Although the value of search consultants was widely endorsed by informants, this endorsement came with certain provisos. First, it was considered very important “that the individual [consultant] spends sufficient time getting to know the culture of the institution; many have longstanding relationships with us.” The

search consultant must share the objectives of the search committee, partner successfully with the committee chair, and understand that, while the search firm's services may be invaluable, the committee retains ultimate control of the process.

It was noted that the search consultant must support the committee chair in directing and guiding the search committee and in facilitating an open, consensual process throughout. There are times when a search consultant will be very influential in the committee process. The search consultant must also give a full hearing to committee members about their concerns.

The search consultant is expected to provide professional advice about hiring best practices. Only one informant reported having an experience with a search firm that used objective tools to measure the ability of candidates, as described below.

*This headhunter had a system based on questionnaires to predict leadership ability, job fatigue, management skills, the speed with which someone would make decisions, and how wide a scope the person would use in making decisions [...] He had contact with statistics experts, and the tools had been used on a large Canadian sample to produce benchmarks. He would bring the candidate objective data, with his opinion, and with references.*

Informants provided many other examples of value added by search firms in senior administrator hiring. Search consultants may contribute in the early stages of the hiring process by assisting the committee with the development of search criteria and the job advertisement and later play a significant role in screening candidates. Search consultants help the committee by doing due diligence and reducing the considerable investment of time that would otherwise be required of committee members in screening candidates.

Informants underlined the importance of the network of contacts provided by search firms which adds to the candidate pool. As one interviewee stated, "You don't really get applicants for these jobs; you're going to try to extract someone who's happy somewhere else [...] You think this is a good career move for them, based on what we know publicly or what the search firm's database contains, and then you want to try to attract them to your institution."

Using search firms is considered helpful, one informant explained, because "a search firm can sometimes persuade somebody to at least consider applying on a very confidential basis. In many of these positions, you would never want it

known that you were even considering it, unless you're pretty sure you're going to be the ultimate candidate." Search consultants bring an awareness of the market, the positions currently up for hire, and the current situation and career stage of those in their pool of external candidates.

Some informants stated that an important value added by search firms is the fact they help bring a more objective or "global" view to bear in hiring. The headhunter may ask questions about the fit of the individual, whereas academics push their own interests. The stakes in senior hiring are very high and, as one participant explained, "The expectation is that search consultants will be able to serve the interests of the university as a whole." A number of informants underlined the importance of this point.

*We face enormous challenges. In these circumstances, it's crucial that we don't surround ourselves with people who think like us [...] The way universities do it tends to support too much the faculty search committees in finding leaders that look like themselves, maybe someone who has a lot of research money and knows the faculty of science really well.*

Search consultants are expected to understand the culture of particular universities well enough to help in the pre-screening of candidates. However, the informants interviewed were not convinced that search consultants understand all of the workings of university culture sufficiently to judge the cultural fit of a candidate. An informant gave the following example.

*I don't trust the process completely. The university and the search firm must have the same objectives. If there are three candidates, the headhunter will interview the references and choose the person who is the least negative or controversial. But this may not be a good way of doing it. It's possible that someone is controversial not because they are not a smooth operator but because they have principles and were fighting for them or ideas they didn't want to abandon.*

Some informants cautioned that in using search firms universities must remain in charge of the search. The search committee must not pass on final responsibility for the hire to the consultant. To avoid this, the committee should participate fully and committee members should be privy to all the information gathered.

*We use [the search firm] to find out if there are people we wouldn't get with an ad necessarily. We use them to build the pool, to make the phone*

*calls, to promote the position, and they may do the preliminary screening and present the candidates. But they don't finish the search. We decide on the fit with the institution, they're not as strong at that. We develop the interview questions, we chair the search committee, we do the reference checks, we negotiate with the candidate, and we send the rejection letters.*

If a committee is excluded from the reference checking process and doesn't have access to the findings, it will be limited in its ability to judge the candidates. Informants emphasized that while the expertise of search consultants is valuable and even essential, their value lies in performing a circumscribed supportive and facilitative role.

Several informants described having negative experiences in which a search firm strongly recommended a candidate who was a mismatch. They emphasized that it is important that the search consultant does not select the final candidate or make decisions for the search committee. Committees must thus balance the need for support and input with the risk of being overly influenced by the search consultant in decision-making.

### **EXTERNAL/INTERNAL SEARCHES**

There is a trend toward external hires in senior university administrator hiring. This trend is by no means universal, but it is increasingly common. In some universities, there is increased frequency of internal hiring for academic positions combined with more frequent external hiring for non-academic positions. The reason most often given for increased external hiring for senior administrator positions is the increasing need for university administrators to possess management skills. One informant attributed this to the fact that universities have not historically grown the types of leaders required today. This is summed up by the following comment: "The emphasis on excellent teachers and researchers doesn't allow people to grow as senior administrators."

Despite the fact that universities need to hire externally today, there is general agreement that external hires are riskier than internal ones. One informant estimated that the university's success in internal hiring is about 80 percent, compared to 60 percent for external hiring. Repeated examples were given by informants to illustrate the unlikelihood of success when individuals are hired from other sectors and their leadership style does not suit the collegial and democratic culture of universities.

One informant offered a formula for very high rates of success based on internal hiring, but beyond the emphasis placed on finding a good institutional fit, a comparable formula for success in external hiring did not emerge.

*When there is a good internal candidate who is being pushed by his/her colleagues to become a candidate, that person is already known to be a leader, to have the necessary qualities, and has a collegial group supporting him/her. This is a formula for success.*

Informants argued that internal hires can be more successful than external hires because the candidates are often better known and supported. For example, one noted, "There may be fewer surprises, although these candidates are also likely to be people who are susceptible to groupthink." However, it was pointed out that some internal candidates who are known in the university community for making unpopular decisions will face internal opposition. Internal hires may also have a performance advantage when they are hired and find it easier to get things done during the term of their hire.

*You are more successful when you know the informal ways of getting business done, and that takes a while to know. I know precisely who to call if I want a particular thing done, who I can have on side and who I can then use to champion whatever it is I want to have done.*

One informant stated, "With external hires you're always rolling the dice a little bit; you're hoping that the track record that you see is going to translate and somehow be transformative when that person comes to your institution." In other words, there is an element of chance in these circumstances.

External hires may take place out of necessity due to a lack of support for or interest from the available internal candidates. One informant explained this in relation to dean searches.

*My view is that the role of a unit chair is the worst possible position that anyone could ever hold. You are caught between the top telling you "this is what we want to have done" and your colleagues telling you "we don't like that," and you're going to go back and be one of those colleagues. So, sometimes people find it very difficult, and then they won't be successful as a dean because people have long memories. That's why we [have] brought in a lot of people from outside as deans.*

Several informants talked about a notable increase in external hiring of very senior administrators, such as vice-presidents and presidents, and the benefits this can have for institutions.

*That was sort of the tradition, that you'd go up the ranks and you'd be a VP of your own university, and now that is completely different. You can look around the country to all the VP academics and provosts, and the last count I saw was only one VP academic from his own institution who went from an internal position, and every other one had come from somewhere else. And that is very important because that way, it gives variety and doesn't entrench people in their institutional processes.*

*With presidents, you want this kind of cross-fertilization that you need in order to have the different sets of ideas and different perspectives, and also that you come in with no history so you look at everybody fresh and from scratch. And that has its advantages and disadvantages.*

In smaller universities, as one informant noted, universities must engage in external hiring if they wish to build a national reputation.

*We are a very small university, and some argue that we don't have the means to choose someone from outside the university. The community chooses its leadership from within the community. I see it as a formula for the failure of the university. If a university wants to have a national stature, you have to put yourself in that position.*

Although care must be taken with internal candidates who lose a competition to an external one, it was suggested by informants that the strongest competitions provide committees with a balance of internal and external candidates. Many informants agreed that striking such a balance is beneficial, particularly with respect to hiring of deans. A balance of internal and external hires allows for stability and for the development of the internal candidate pool while also opening universities to new ideas.

Clearly, while external hiring has many advantages, institutions must strike some kind of balance between external and internal hiring. If one hires only from the outside, talented younger staff may become disenfranchised; if one promotes only from within, one risks almost certain stagnation. The ideal would be to reward those that have grown through the institution's own ranks while supplementing them with outsiders who bring in new insights and best practices; in this way, one mixes the old and the new while creating a culture of friendly

competition. The precise overall mix will differ somewhat from institution to institution. Smaller institutions, for instance, may want to consider external hires more often because of their smaller internal talent pools; larger institutions may wish to rely slightly more on internal hires, unless the president and search committee agree that an outsider is required to “shake things up” in a particular area.

### **CLOSED/OPEN SEARCHES**

There are two ways of conducting formal searches for administrative roles: “open” and “closed.” An open search means that at a certain point in the selection process – when the number of candidates is down to a half-dozen or less – the candidates’ names are made public and the university and local community can meet, question the candidates, and learn about them. A closed search is the opposite, where the process is closed off and very few people outside of the search committee know who is being considered.

Some informants noted that, increasingly, their universities felt obliged to engage in a relatively open hiring process. Others suggested that a more complicated trend has emerged: searches are reportedly becoming less open at the highest administrative levels, while at other levels they are reportedly becoming more open. Presidential and provost searches may be completely closed in order to provide confidentiality to candidates. At the other end of the spectrum, dean searches in particular are often being conducted more openly. Candidates for dean may be required to give an interview to various groups on campus, attend informal drop-ins, or give a public presentation and field questions.

Open searches are a problem for candidate pools. One informant said, “This has become a major challenge in getting away from the traditional public presentation, because some candidates, some very good candidates, don’t want to tip their hand, so to speak.” People with a job at one institution may have very good reasons to be reticent about applying for a job at another institution if the process is an open one; simply put, their ability to do their own job at their own institution will be severely compromised if it becomes known they are looking elsewhere for a job.

What likely compels universities to engage in an open hiring process is the necessity of obtaining community input, feedback, and buy-in during the senior administrator hiring process. In the words of one informant, “The process has to be a pan-institutional process: every voice has to be represented at the table.”

Clearly, the principle of pan-institutionalism does not stop with the selection of a broadly representative search committee; it extends beyond committee selection to the final stages of hiring. In effect, this is a further acknowledgement of the power of the university community to make or break its leaders. Thus, as the final candidates are being wooed, so too is the university community.

This is not to imply that closed hiring processes are risk-free. With a closed search, there is a greater chance that the university community may not recognize and accept the leadership of the chosen senior administrator. On the other hand, public processes involve a certain degree of risk for candidates. This was well explained by one informant as follows.

*[In the United States,] where there is a public disclosure and you can Google somebody and find out what jobs they've applied for, the comment even before they're considered is, "Well, they didn't get hired in this place, that place, and that place. Why should we hire them?" The fact that you apply for a job and you don't get it can be for a hundred different reasons. You could be a perfectly qualified and good person, and it just might be that they're looking for different sets of skills. It doesn't mean that you're bad, but committee members see it as that. So, I think that people who are brave enough to go through the process have usually not a lot to lose.*

The thinking, as one interviewee put it, is that "if you have that kind of trend wherein people are moving more between institutions, i.e., in order to move up you have to move out, and you have these kinds of public processes, an open process is a problem." Closed searches are becoming more important at the VP level, since "many people – public and private sector – don't want their names getting out." Senior administrators whose colleagues learn they have competed for another position risk losing credibility and influence.

*But that has to be balanced by making sure that the university community has a chance to meet folks. I think the worst thing you could do is say, you know, "This committee of 14 met, selected your dean of music, and here she is," and everybody in the music faculty says, "Well, we never got a chance to meet her!", [and you reply,] "Well, we wanted to make sure that nobody got word that she was on the job market."*

One of the perceived benefits of closed searches is that the candidates may be of higher quality. A closed search, said one informant, "gives you candidates that are

better because they're people that have something to lose, and that means that they're in better positions generally." Another argument in their favour is that closed searches may permit greater rigour in screening. One informant maintained, "A closed process that is confidential allows there to be more real scrutiny, as opposed to somebody who would be publicly popular or would know the right buzz words to say."

Open searches – i.e., those that require a public presentation – are becoming more frequent in some universities. Public presentations are looked at as a way of testing a candidate's strength, although this could easily place too much emphasis on public speaking ability, as in the following informant anecdote: "The one candidate who we thought was actually quite good, [...] his public performance was not as good as we thought it should have been. That immediately eliminated the individual from the short list."

There are pros and cons to both methods, of course. In determining which method an institution should use for a given position, it is necessary to look at the context of the hire – internal or external. If it is decided from the outset that a hire will be done internally, then an open process is much more acceptable. However, institutions need to recognize that if they are trying to hire from the outside, then an open selection procedure is going to limit the available talent pool, particularly at senior levels. If an institution is serious about attracting talent from outside, then the process needs to be closed. Closed processes allow for anonymity and permit anyone interested in a job to step into the ring without fear of reprisal at their current institution should they not get the position. This changes the role of the search committee somewhat: they must vet candidates more thoroughly, and perhaps a larger and more diverse committee is required as a result.

### **SEARCH CRITERIA**

University search committees must be clear about what they are looking for in a candidate and agree early in the process on the evaluation criteria that will be used. One interviewee explained the reasons for this as follows: "Clearly setting criteria helps avoid split committees. Search criteria are often defined by former searches. But things could have changed, so discussion at the outset is important."

By defining the criteria, as one informant put it, "the blueprint of the ideal leader is created, and then a number of candidates are matched or mismatched."

Universities are looking for someone who “strikes a balance between accountability and competency, someone that lines up with what your university really needs and values.” Candidates are sought who have the requisite “knowledge, skills, and ability, and then the big [question] is: do they fit with the [university's] culture and can they fit with the existing team?” Candidates must also be suitable in terms of what the university can offer in salary, benefits, and career advancement opportunities (see the end of this section for further discussion of this issue).

It is equally important that committees reach agreement at the outset about the breadth of the search – that is, whether candidates who originate in other sectors will be considered, and if so, what breadth of experience will be considered. This can avoid conflict later on. Those involved in senior administrator hiring argued that it is very important for the committee to have an understanding of what the challenges of the position will be, and this understanding should be reflected in the search and evaluation criteria. Universities must cultivate self-knowledge and utilize that knowledge to maximize hiring success.

*[A] search firm could play a role here. The search consultant is probably going to meet the chair and even the committee. It might be useful for the consultant to engage with an even broader array of constituents and to do what you are doing in this research, ask a series of questions and then make recommendations like what to expect re[garding] pools of candidates for the position, given whether there are big differences in the institution, a history of stability, or whether the institution is at war with itself.*

One informant with a long history of involvement in academic searches stated that search committees typically operate without reflecting on how they would define a successful hire: “In all the years I’ve been here, I don’t ever recall this question being asked at a hiring committee. We’re so focused on the candidate’s qualifications and background, etc.” Thus, defining the concept of success at the search outset would perhaps add something useful to the hiring process.

Committees start by consulting stakeholders about the job description. The job description generated by the committee for the purposes of advertising a senior administrator position serves as a profile of the ideal candidate. Profiles for various positions often have a lot in common, since it is understood from the outset that most likely not all of the criteria will be met. This can cause problems

later on in the search process, as the relative importance of different criteria becomes clearer. Committees must then engage in *post hoc* debate about specific criteria which it may have been valuable to discuss at the outset. One informant explained this issue as follows.

*No one person is going to fulfill all [the criteria]. Often, particularly in the first round of interviews, the search doesn't succeed, and we get down to the point of saying, "What do we really need? What things on this list or two things on this list are critical, that we absolutely have to have?" Those are the important things. When you write up the initial criteria, they may all seem important at the beginning, but by the time you get to the end, they're probably not. And it's the list of what's really important at the end of the process, that's what you really have to pay attention to.*

While the criteria eventually established by the search committee may reflect the combined expectations of the committee and faculty, they may not reflect the university president's perspective.

*Then, eventually, you have a conversation with the president about the real job that will have to be done. And I've thought to myself, "Why didn't you tell the committee this [earlier]?" Your marching orders end up being different from what the committee and faculty have been told. I think the president should also inform the faculty [directly] about [...] major priorities.*

The situation described above could lead to the hiring of a candidate who might be working at odds with the president's agenda – a situation which is unlikely to benefit either the institution or the new hire.

Clearly, search committees and senior administrators need to pay more attention to the job description and list of desired characteristics. They also need to be realistic about what university administrative jobs entail in the 21st century. While there may be good reasons to want academics to fill senior positions, these jobs now involve a large amount of budgeting and fundraising work; skills in these areas are thus very important and need to be ranked fairly high in the list of hiring criteria. Increasingly, there is a need to hire administrators who are also academics, rather than academics who *might* be administrators.

## **RECRUITMENT**

After the search criteria and position profile have been agreed upon, the position is advertised online and in magazines and newspapers such as *University Affairs*

and *The Globe and Mail*. Newspaper advertising is used because, as one respondent commented, “you get better candidates when you cast a wider net.” One informant at a small university questioned whether the expense of advertising with major newspapers is justified, since the informant did not believe that individuals outside the education sector respond to newspaper ads; they are more likely to be recruited by a search firm. Budget limitations force some small schools to choose between advertising in *The Globe and Mail* and hiring a search firm, as they cannot afford to do both.

Many senior administrators are convinced that one of the determinants of successful senior administrator hiring is the availability of a broad, deep candidate pool. “Success is directly linked to how wide the funnel is through which the applicants/potential applicants are being sought and then how it gets narrowed down,” explained one informant. The ability of universities to attract a broad, deep pool of candidates is influenced by other factors, too, including institutional reputation and candidates’ preferences.

*Reputation is important. The better the university’s reputation, the bigger the size of the candidate pool. Every university wants to be a Harvard or large research university. For decanal appointments, so much depends on the reputation of the faculty. For administration, it’s the reputation overall.*

A university’s ability to fill a position depends on its ability to compete for the talent that is available at any given time. This is where search firms play a key role since, as one informant noted, “a good search consultant can help position a university that is not in the top ranks by understanding what the market is and how they can attract and develop good people at that level.” A university’s reputation depends on many factors, such as whether it has a research or teaching agenda, how research-intensive it is perceived to be, and how much grant funding it receives.

Many senior administrators do not place much stock in Canadian university ranking systems, although they said good press about university rankings does affect institutions’ reputations and candidate pools. “[The] *Macleans* [ranking] is very superficial, but those kinds of issues can influence the people who choose to apply,” said an interviewee. “If we are in the news, that has an influence. More indirectly, it can have an influence by reducing the prospective pool.”

In order to create a good candidate pool, universities are helped by having a reputation that sets its leaders up for success rather than failure and by being perceived as an institution that is a great place to work. The visibility of the university's leaders, faculties, and departments also contributes to the strength of its reputation. The reputation of a successful president can draw desirable candidates, as can the reputation of a specific faculty or department.

The current state of the university also impacts the ability of an institution to attract good candidates.

*The state of the institution is important. Is it in an upswing? Is there plenty of investment and research money? And plenty of students? Is the university gaining or losing students? Is the city booming? Has there been a huge strike in the university recently or budget cutting? Or if there has been a relatively long period of peaceful relations between the union and university administration.*

Candidates' preferences are another factor that influences the size of candidate pools. The identification of candidates' preferences may provide clues to their suitability for a position given the university's current state. For example, as one informant commented, "Some people enjoy challenges. Some people might enjoy going in somewhere where the budget is really tight and working it through. But the same challenges may scare some people; you have to talk to them to find out." These differences must be understood as part of a two-way determination – by both the university and the candidate – of cultural fit.

Candidates' preferences vary widely. For instance, individuals have different preferences when it comes to where in Canada they are willing to live or move to. Location is a particularly significant factor when the needs of spouses, young families, or elderly parents are part of the equation. In smaller, more remote centres, universities may have more trouble attracting candidates. In that case, they must actively "sell" how the advantages can outweigh the disadvantages.

*We definitely lose out on candidates who just don't want to move here. They have no interest in living in a small town. If they want to be anonymous, this is not the place to come. You will be known, people will know your name, people will expect you to be engaged.*

University size and university type are other factors where candidate preferences have an impact. The same opportunities do not look the same to different candidates. "There are some people that love rural locations; other people feel

more comfortable in smaller institutions; other people feel they want to be part of an institution with a medical school,” noted one interviewee. Some preferences may be related to candidates’ career paths: “Some candidates will be looking at whether an institution is comprehensive, has a medical school, or has career professional schools, or whether the school is a university or college, is primarily undergraduate or has a graduate school.”

Finally, some individuals may not be as mobile as others, depending on their faculty and stage of career. The mobility of science faculty, for example, may depend on the laboratory facilities available in a given university.

*If I were to move, I’d have to give up my research because it takes ten years to set up a lab. In administration, you have to step back from teaching and research. So, unfortunately, you would get the type of person whose teaching and research was in decline.*

As higher education experiences this shortage of skilled administrative talent, institutions need to know that the battle to attract and retain top candidates is only going to become more fierce. The reality is that candidates are no longer romancing the institution to get a job; institutions now need to romance candidates.

In other words, institutions need to sell themselves to potential employees. Partly, this means selling the institution and the surrounding community as a fulfilling place to work and live. Partly, it means showing candidates how the institution’s interests and medium-term future align with those of the candidate. Search committees therefore need to know enough about the top candidates to highlight why the job would be beneficial to them specifically. Institutions can’t simply make a generic pitch to all candidates – some customization is necessary in order to get candidates more excited about the job and the impact they can have.

This kind of approach is valuable not just in terms of hiring but also in terms of retention. Different institutions have different cultures, and people who were successful in one environment may not be successful in another. Hiring someone who does not fit the culture can lead to a quick termination, requiring another lengthy and expensive search.

### **CANDIDATE SCREENING**

The screening stage of the hiring process is critical. The selection of an appropriate candidate depends on doing due diligence at this stage. In the first

stage of candidate screening, the pool of candidates who expressed interest in a position is narrowed down to a first long list of those who appear to best match the requirements. Pre-screening interviews may be used to help the committee narrow the list down, or the committee may perform this step based on screening, rating, and comparing their evaluations of candidates' applications. Two short lists may be generated successively: first, the long list is narrowed down to the first short list of candidates based on pre-screening, and then it is narrowed down to a short list of three to five candidates. Shortlisted candidates are those who appear to best fit the requirements of the position and the university's culture and mission, based on screening and discussion. The committee discusses and rates the candidates and attempts to reach consensus on the best one.

### **DUE DILIGENCE**

"Disastrous" failures in hiring – that is, when a university badly misjudges the abilities or suitability of an individual – can often be attributed to faulty reference checking. Reference checking should ensure that candidates' references are consistent, and questions should be asked about their achievements and characteristics.

In the ideal hiring process, as emphasized by informants, candidates will be asked to provide a second set of contacts so that much more detailed checks can be performed for the final few candidates. During reference checking, it is necessary to ask how individuals work with the people they report to and the people who report to them, as well as inquiring about their strengths and weaknesses.

Usually, informants said, evidence about a candidate's quality can be found if one takes the time to look for it. What interviewees found very important in the final stages of candidate selection was, as one said, to "get the candidates' consent to talk to whoever we want to, to people other than those they recommend. We do this when we get down to the last one or two. [We] get their consent to get transcripts of those conversations."

One informant maintained that it is very important to conduct reference checks before the candidate short list is decided: "Otherwise, [committee members] tend not to listen to what they might hear in the reference checks; they tend to explain away problems." Another participant concurred: "A group of people will consistently stand on its decision irrespective of the evidence against it."

Informants noted that search consultants play a key role, particularly in preliminary reference checking, because they may be more willing to see evidence that suggests the committee's preferred candidate is not well suited to the position.

*Whether or not it's volunteered, you have to insist on going beyond the references provided initially to explore the candidate's history and gaps in the CVs. I don't mean you go behind the candidate's back; you work with the candidate to generate lists. In a recent case, when a reference check was made the individual was not as they had presented. This is where you most often rely on an outside consulting firm. It's an important part of the process; something could go wrong if you overlook it.*

The search consultant can do a great deal of the due diligence required in candidate screening, but informants strongly cautioned that committees should not relinquish too much responsibility for the search. Even though search consultants are able to provide an objective perspective during reference checking, it can be detrimental to decision-making if the committee does not participate in the final stage of reference checks or is denied access to the information gathered. While candidate confidentiality is a concern, it is more important that committees be able to make fully informed decisions.

### **FINAL CANDIDATE SELECTION**

The interviewing of candidates is another key element in screening. The importance of using a consistent process – i.e., a consistent set of questions in interviewing candidates – was underlined. One informant stated, "We do quite an elaborate interview that's behavioral as well as vision-based. We ask, 'What experiences do you have with these kinds of issues?' We want to probe deeply to find out about that."

In the final stage of the process, informants underlined the importance of asking candidates to talk about their aspirations and getting a sense of their projected career trajectories, in order to determine the likelihood that they will be committed to staying a full term or beyond.

*I think you [need to] have the right kind of dialogue with candidates. One of the questions you have to ask is, "What are your ultimate aspirations, and what do you see your career track and what's the timeline for your progression to get to your ultimate aspiration?", so that you're not*

*blindsided when you hire someone and think, "This is great," and a year later, they're looking to move up the ladder either with you or with another institution. That would be one of the places where you could end up with an unsuccessful hire.*

Committees must be mindful of the fact that some individuals perform better in interviews and search processes. Interviews on their own are therefore not sufficient to determine whether an individual is the best fit for a particular team, university, or culture.

The conflicts and internal divisions playing out in some universities can have an impact on hiring when the search committee reaches the final stages of candidate screening and attempts to reach a consensus on the top candidate.

*Universities may have a mandate of looking for a change agent, but that isn't always what the university wants when you take into account all the institutional groups that want to maintain the current status quo [...] A candidate can say the things in an interview that are what was expected and not be what the administration is looking for. It comes back to the difference between being a change agent versus someone who will support the status quo. On the surface, the institution is looking for a change agent, but when someone enters they may find that is not really what the institution is looking for. Why? There are differences in the university that may not be reflected in the search or on the search committee. In a recent search, everyone agreed that we wanted a change agent, but no one could agree what that would look like. Ultimately, the individual we ended up hiring was a defender of the status quo because that was the best compromise. It was something like a fallback to what they could agree on, since they couldn't agree on how change should take place.*

Universities must also be able to convey the institution's mission and present a coherent vision to candidates.

*When you're hiring a senior administrator, the senior administration itself has to have vision, direction, and strategies, and they have to be promulgated to the community and to all potential candidates. What you really want is [that] the potential candidates see the cohesiveness of the vision and actions that the senior team is already engaged in, so there's something they can buy into.*

Universities must know themselves well enough to not only screen candidates but also to provide candidates with a briefing, so that they can choose whether to pursue a position based on a full understanding of the challenges that come with the job. One interviewee put it thus: “Once a person is clearly on our short list, we then want to make sure they know fully what they’re getting into, so when they’re signing on, there are no surprises. [There has to be] full disclosure or it’s not going to work.”

The institution must consider carefully whether the candidate will be able to manage any challenges the university is experiencing. One informant saw this as an area where improvement was needed in senior administrator hiring, stating, “We don’t deliberate enough at the end about current challenges. How would the candidates react to budget cuts or other constraints? Input even from possible colleagues or students could be useful in considering this.”

From the university’s point of view, the biggest single consideration in the final selection of the top candidate is institutional fit. An individual must be perceived as a good match for the university’s needs, culture, and challenges. Similarly, the institution and opportunity must match the individual’s expectations, competencies, and career stage. Candidates must understand the degree to which they have autonomy and where the role they are considering is situated within the constellation of senior positions at the university.

While it was agreed that a candidate’s suitability to a university’s culture should be carefully assessed, it was also widely accepted that it can be a difficult matter to judge.

*It’s the taste in the mouth, it’s something intangible, it’s the fit of the person beyond the resume. How well is this person going to understand the culture and participate in it? Fit is about comfort level and being comfortable in their skin – not arrogant or overly egocentric, but comfortable with who they are and with expressing it.*

Assessing the fit of final candidates is a heavy responsibility that is likely to fall to the most senior staff in the university decision-making chain. The president or vice-president, for example, may “play a far more engaged/active role at this stage, in checking out references and being very attuned to issues of ‘fit’ within the organization and institutional culture,” explained one informant. Another stated, “I make sure that when I get down to a short list, I have my senior

colleagues help me to review it to see if we've missed something in the last three to five candidates and if we should invite them [back]."

Lack of institutional fit can make it very difficult for an administrator to succeed once hired. Committees may be forced to choose between someone who is "a good team player to whom colleagues seem to be important" versus "someone who has a track record of being an effective administrator but who may be a bit of a tyrant." In other words, in a choice between collegiality and administrative ability, the former is seen as more essential than the latter, due to the democratic nature of universities. Part of the quandary facing universities today is that there are not enough academic candidates who can provide both characteristics. Change is needed, but it is generally believed that "the degree to which [a] person can challenge the culture depends on their fit."

### **MAKING A MATCH**

Shortlisted candidates may be interviewed by the search committee over several rounds. The process appears to vary across searches and universities. Some senior administrators, such as committee chairs, who have a decision-making role in hiring begin to cultivate relationships with the strongest candidates from the time of the first interview. "When we do the first round and we bring the candidates in for the weekend, I meet with them afterwards," explained one informant. "If I've seen someone I thought we're going to have back, I'll begin to form a relationship with that person."

Adequate exposure is considered to be very important for the search committee and other constituencies on campus to reach final consensus on a candidate, just as it is important for candidates to accurately assess their own fit with the institution. One participant explained: "In an ideal hiring, by the time the candidate leaves the institution, they should be talking about it as their institution." University searches appear to vary widely in this regard.

*I am gob-smacked at how little effort is made to cultivate candidates. I had an interview once. There were big gaps in the schedule. I was left by myself and ended up going to get a hot dog at a stand outside the bookstore. Then, at the other extreme, I once had 23 meetings in two days but no one showed me the campus or the residential housing area of the community. In the end, I worked there, but as a hiring process it was terrible.*

It was observed that the hiring process could be improved by being more “candidate-centric,” meaning that universities should provide candidates with enough exposure to the university, its surroundings, and its various constituencies to enable them to make an informed decision about coming. In addition to meeting with candidates informally, some universities also “make sure there are events available for the person to explore the campus and to feel that this is a place where they could be successful,” noted an informant.

Whether the institution gives candidates a warm reception is another factor that can affect success in hiring. One informant recounted an instance when “we had someone withdraw because they were not received warmly.” The process can sour some first-time candidates to the point where they decide not to attempt it ever again. There is an important difference between full disclosure by the committee and information reaching candidates by other means. For instance, it can be very damaging to the hiring process for candidates to be approached by members of the university community about the constituencies and people on campus who oppose their hiring. While the behaviour of the larger university community is something over which a search committee has little control, it is a factor that has a powerful impact on the outcome of searches.

A split committee – that is, when the search committee cannot agree on a final hiring decision – can be a problem if a candidate is hired, since a split decision could mean that support from the university community after hiring will be divided. One informant stated, “If we have a split committee on the final candidate, the likelihood of success in the long run is less. If the split takes place at the short list stage, it works itself out usually.” In some cases, when a committee is divided in its support for the shortlisted candidates, the search does not lead to a job offer. The search may be restarted or put on hold.

Some informants stated that they use the following ground rule when a search does not deliver a suitable candidate: “We’re not going to hire the last one standing. We’re going to hire the right one. There’s always pressure to complete a search, but it’s important to resist the urge to finish the process just to finish it.” There was general agreement on this point. Similarly, informants advised that as a general rule the search should not be continued from the outset if there are not enough candidates to allow for a reasonable competition.

## **JOB OFFER/NEGOTIATION OF TERMS**

A candidate's terms and conditions will be addressed at this stage of the hiring process. Candidates should not have to ask about compensation; that information should be offered. The final candidate may have terms which universities will be expected to consider. Some candidates have a partner who is an academic and also wants a position, either at the university or in the community. One informant indicated that he had "pulled out because no one had talked to my wife. She wants to know not just that there is a job but that she is wanted in a job." Some universities sponsor the whole family to visit the school and community.

When a job offer is made, some informants defined success as "getting a good candidate to take the job within a reasonable timeframe." The ability of universities to be flexible in hiring is considered essential if a committee believes that an exceptional candidate has been located. "Elasticity is important even if it takes two years of support," remarked one interviewee.

Smaller universities have a harder time offering competitive salary and benefits packages. They also have a harder time hiring in non-academic positions because the hires are more often non-academic, which means universities must compete with private sector salaries.

While the final steps of this process often sound simple, they rarely are. Just because a search committee falls in love with a candidate doesn't mean that the candidate will return the emotion. Institutions need to take time to make sure that there really is a fit between the candidate and the institution, as well as taking time to sell the institution and its culture to the candidate. This is not a step that should be rushed. A successful hire is going to have a relationship of at least five and hopefully ten years with the institution; it is thus critical to forge some bonds with future colleagues and community members from the outset. For a hire to be truly successful, all of these dots need to be connected. If something is overlooked, forced, or misjudged in the rush to make a decision, then the odds increase that the hire will go awry – sooner rather than later.

### **INSTITUTIONAL SUPPORTS**

Very few of the informants stated that the hiring process was over-emphasized in senior administrator hiring, but those who did argued that institutional factors are much more significant to successful hiring.

A number of informants discussed the types of institutional supports that can help ensure success over the term of a hire. Universities must provide the budget

and resources that enable success. One informant described the active mentoring approach taken at his university to increase the probability of success.

*Individuals are more likely to be successful when we pay more attention to how we help them, who we put them in touch with, [and] how we get them some informal mentors, because for most people in senior roles, there's not a lot of people they can go talk to about the problems they face or get advice [...] We will also use coaches, so we'll bring in highly skilled people from outside the university to work one on one with some of our vice-presidents or deans and assistant vice-presidents from time to time, where we think that some third-party intervention might be helpful to get them some tips.*

Some universities support a new president's transition by making sure he or she receives information about key issues.

*[We provide support by] deciding the order in which the new president meets with people and making sure he is filled in on what various people think are the big issues, the "mines ahead." It's how well they are prepared, not just how they are hired. Informed about the contentious issues, the new person will know not to stake a position too early.*

Although it is true that the hiring process alone cannot be expected to deliver successful hires, institutional supports likewise may not be enough to ensure success by themselves. One informant described a hire in which the candidate ended up leaving: "I spent an inordinate amount of time trying to make it work, [but] this was somebody that came from outside the academic environment and had a very difficult time adjusting to the culture, which speaks to that 'fit' issue."

## SECTION 4: CONCLUSIONS

The progress of universities in future will depend in large measure on the work done by those who are hired for senior administrator roles. This is why it is said that decisions about the hiring of senior administrators are among the most important decisions made by those in senior university administration. Many senior administrators are interested in sharing best practices to support success in the hiring process. This sometimes extends to an interest in or openness to considering the use of objective measures or tools in senior hiring.

The hiring process is understood to be a key determinant of positive hiring outcomes. This is why a great deal of emphasis is placed on the ability of those involved to stage a “successful process.” This means delivering a successful leader who meets the university’s objectives over a term, with enough support from the university community to be considered for renewal.

Universities do not have complete control over this process, however. There are currently many wild card factors that play a role in senior hiring. Hiring success rates appear to be in jeopardy based on the professionalization of universities, financial constraints, and shrinking candidate pools. Non-academic hiring in Canadian universities is so far taking place mostly in non-academic roles. Outside Canada, there is hot debate about whether universities should be led by academic presidents.<sup>4</sup> In Canada, the jury seems to be out at this point; while there have been some non-traditional presidential hires, turnover in university presidents in Canada is not necessarily attributable to this.

Due to the shrinking talent pool, universities are increasingly finding themselves in competition with one another to attract the available talent. In this competition, some universities clearly have an advantage over others based on their reputation, size, location, and financial clout. Smaller institutions which do not have the allure of the G5 can still compete for top talent, but doing so requires a “candidate-centric” process that involves selling the institution based on a customized assessment of the candidate’s values and interests.

Today, universities must perform multiple balancing acts in senior hiring. Internal candidate pools are smaller and academic candidates are harder to locate, even externally. This, combined with the increased demand for individuals with management skills as universities attempt to become research institutions, means

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<sup>4</sup> Goodall, A.H. (2009). *Socrates in the Boardroom: Why Research Universities Should Be Led by Top Scholars*. Princeton, New Jersey: Princeton University Press.

there is increased reliance on external and non-academic hiring. The risk of failure in external hiring appears higher than in internal hiring. This may account in part for the trend to more public hiring processes, since open search processes make external candidates known to the wider community of university stakeholders. An open process can be useful in gauging the extent of the university community's support for a candidate and also in beginning to build support, which may help improve the likelihood of a successful external hire somewhat.

At higher levels, however, closed searches are favoured, since candidates at this level may refuse to enter an open search process due to the career risks involved. The increased examples of turnover at the highest levels of university administration are related not only to external hiring but to the fact that searches are increasingly being conducted via a completely closed process. The trade-offs universities must make to attract candidates and build candidate pools while still satisfying the demands of democratic university culture result in contradictions that possibly, or even probably, cannot be completely overcome.

One of the greatest risks in senior university hiring is the accurate determination of two-way fit, and universities may need to improve in this area, especially with regard to external hires. It is possible that this is one of the next frontiers in senior university administrator hiring. With the more frequent hiring of external candidates and candidates from other sectors, the risk of poor fit is increased. Can the lessons learned from external hiring be used to reduce the likelihood of failed hires in future? Possibly. It is also possible that higher levels of turnover, including planned exits after one term, will become more common due to the difficult challenges facing those in the most senior roles, including the challenges of maintaining community buy-in and resolving conflicting visions of change, both for universities and university leadership.

A question with no ready answer is whether divisions in universities regarding the institution's mission and direction (which mostly manifest as conflicts between faculty and administration) pose a risk to making the changes universities need in order to adapt to current challenges and remain globally competitive. There are hints that, in response to conflicts between constituencies over competing visions of change, university search committees hire candidates who support the status quo as a default course of action. Given this context of divided visions, it is possible to foresee an increase in closed hiring and continued rapid turnover at the most senior administrator levels.

In summary, it is widely believed by those with decision-making roles in senior university administrator hiring that successful hiring depends greatly on the hiring process. This process is subject to many contingencies, but universities are more likely to make successful senior hires when they can:

- use a structured process;
- select an effective chair who can lead the committee in consensus building;
- form a functional and representative committee capable of promoting the interests of the university as a whole;
- obtain the professional input of a search consultant in all aspects of the search who will support the chair and help with due diligence in the screening of candidates;
- develop clear hiring criteria;
- recruit a broad pool of candidates;
- balance internal and external hires as part of a succession planning strategy;
- conduct rigorous screening of candidates in which the right questions are asked;
- conduct a second round of reference checking with a broader network of references;
- ensure that the committee receives information that is critical to candidate selection;
- make a good assessment of institutional fit;
- understand the university and the challenges associated with the position being filled and be able to communicate these fully to the final candidates as part of the final selection;
- understand the market and sell opportunities at the school effectively;
- do not make offers to unsuitable candidates just for the sake of finishing the search;
- and provide institutional supports through the term of a hire to increase the likelihood of success.

Finally, it should be stressed one last time that the pursuit of a new hire is essentially analogous to a romance or courtship. Not just anyone can fill a position – it has to be the *right* person. To find the right person means first of all knowing oneself and what one wants from a relationship. Heading out on a search before the key process of self-examination has occurred is likely to lead to one's head being turned by candidates with attributes which are flashy but not

necessarily essential to the job for which they are being hired. Most important, though, is the need to keep in mind that just because a search committee falls in love with a candidate, this doesn't necessarily mean that a candidate will love the university back. Relationships are a two-way street; the importance of taking the time to ensure that a candidate will fit in with, embrace, and be embraced by the campus community cannot be overstated.

## APPENDIX A: METHODOLOGY

A qualitative research methodology was used to gather information for this paper. Information letters were sent by email to senior university administrators in 30 Canadian universities inviting them to participate as key informants in an investigation of best practices in senior administrator hiring. Key informant interviews lasting 30 to 60 minutes were conducted with senior university administrators who had prior experience in senior hiring. Informants' time permitting, some interviews exceeded an hour in length and were extended to as much as 90 minutes. The interview questions were provided to all informants prior to participation.

Key informants were asked a standard set of questions (Appendix B), and the data gathered in response to those questions were subsequently transcribed and analyzed using QSR's NVivo 2.0 software. An inductive approach to data analysis was used such that the themes and findings developed were based very closely on the interviews. The content of the interviews forms the substance of this paper.

Informants were asked to estimate the number of senior university hires they had participated in, the number of years over which these hires took place, and the average number of hires at their university each year. In most cases, informants based their estimates on positions at the level of dean or higher, including president or principal, provost, vice-president, associate and assistant vice-president, dean, registrar, and librarian. In a few cases, administrators at the director level were also counted in the estimates.

The final sample of informants consisted of 31 senior administrators at 24 universities in eight provinces across Canada (Table 1). Interviews were conducted with informants in four G5 universities, eight large universities with medical schools, eight comprehensive universities, and 11 new or small universities. At the time of the interviews, informants held the following positions: president (three), provost (nine), vice-president (15), secretary (one), dean (eight), and other, including director (two).<sup>5</sup> Almost one-fifth of those interviewed held roles in which they were responsible for two faculties.

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<sup>5</sup> The total does not equal the number of participants due to the fact that some informants held dual roles.

Province	Number of Informants
British Columbia	4
Ontario	7
Saskatchewan	3
Alberta	3
Quebec	3
Manitoba	5
New Brunswick	4
Nova Scotia	2

Informants reported having participated in senior hiring as chairs, as committee members, and in consultative roles. During their career in administration, more than two-fifths of informants had had a decision-making role<sup>6</sup> in less than ten senior hires (half of this group had participated in less than five searches), one-fifth had contributed in a decision-making capacity to between ten and 19 senior searches, and one-quarter had had a decision-making role in 20 or more senior searches. The range in experience reflects both the varying lengths of time informants had served in senior administrative roles and differences in size across universities.

Informants ranged from having less than five years' experience (about one-third) to having as much as 20 years' experience in senior university administrative roles. About two-fifths of informants had between six and ten years' experience, and one-third had more than ten years' experience. A few informants were relatively new to university administration but had had lengthy senior administrative careers in government, the private sector, or non-governmental organizations.

The average number of searches conducted at informants' universities ranged from one every five years to as many as five per year. According to informants' estimates, most universities represented in the study conducted searches for between three and four senior administrators (deans and above) per year. Informants themselves reported averaging between one senior administrator search every two years and four senior administrator searches per year. This does not reflect the actual frequency of senior search processes conducted in a year, however. Some senior administrators do not finish a five-year term, while others

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<sup>6</sup> The term "decision-making role" refers to participation in the senior hiring process as either a chair or committee member.

are renewed and stay in the role for ten years, so the average can vary from no hires (this is more likely in smaller universities) in a year to as many as six or seven per year.

## **APPENDIX B: INFORMATION LETTER AND INVITATION TO PARTICIPATE IN THIS STUDY**

Higher Education Strategy Associates (HESA) has partnered with Stoakley-Dudley Consultants in a research investigation of the factors associated with good outcomes in senior university administrator hiring, with the goal of identifying good practices in senior university hiring. To gather information for the study, we are conducting individual interviews across Canada with University Presidents, Vice-Presidents, University Secretaries, and Deans who participate in senior university administrator hiring. The research will culminate in the publication of a report to be made freely available on the HESA website. We expect the research will be of interest to university personnel engaged in strategic planning in universities.

HESA is a Canadian research company that provides a broad array of consulting services to policymakers, organizations, and other stakeholders in the educational and public policy arena. Stoakley-Dudley Consultants is a professional search firm dedicated to advancing good practice as the company expands its scope of service in health and education.

You are invited to participate in a 30 minute interview to be conducted on the telephone or in person. The interviews will be transcribed by hand during the interview or in some cases audio-taped. Your participation in this research will be completely confidential. No information that could identify individuals or the names of institutions will appear in any report of findings. If you have any questions about the study, please feel free to contact us at 416-848-0215.

We would like to schedule the interviews at your earliest convenience. If you are interested in participating, please send us an email suggesting some times when you are available for an interview. We will contact you by telephone to follow up and schedule an interview.

### **Key Informant Interview Questions**

The following questions are designed to gather information about senior administrator hiring in universities in Canada and the factors that are associated with successful hiring.

#### **1. Group 1**

- a) How many senior administrator searches have you participated in during your career as a senior university administrator? Over how many years?
  - b) How many senior searches have you participated in over the last 12 months?
  - c) How many senior administrative searches are conducted in the university each year? What types of senior administrator hires have you participated in? (President, University Secretaries, Vice-Presidents, Associate Vice-President, Dean, etc.)
  - d) How many searches have you participated in for each of these positions?
2. a) How is success defined in senior university administrator hiring?  
b) What percentage of senior administrator hires are successful?  
c) Is there a difference in success rates in hiring for any senior administrator positions?  
d) What proportion of the senior hires you have participated in as a senior administrator do you consider successful?
  3. Using examples, please comment on how you observe that the hiring process has contributed to the success or failure of senior administrator hires. Is your institution doing anything in the hiring process that increases the rate of successful hires?
  4. What institutional factors influence the success of senior university administrator hiring? Please give examples.
  5. What external factors influence the success of senior university administrator hiring? Please give examples.
  6. Have you observed any recent trends in the hiring of senior university administrators?
  7. Please discuss one example of a senior hire you participated in that was very successful and one example of an unsuccessful hire, commenting on how success or failure was judged in these cases.
  8. What are the lessons learned based on your experience in senior university administrator hiring? Do you have any recommendations to improve hiring practices?

*Would you like to receive a copy of the final report?*

Yes \_\_\_\_\_

No \_\_\_\_\_

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