

CHANCELLOR SEARCH HISTORY: Sequence of Activities

[This synopsis was created by Search Chair Arrascada in collaboration with TBG staff.]

Selection of The Bryan Group (TBG)

Selection factors:

- 100% search selection success.
- Recent success finding the new WCSD Superintendent, Dr. Susan Enfield.
- Nevada firm - knowledge of NV and reduced search expenses.
- Much more rigorous and behavioral science-based search process - resulting in the identification and selection of highly-qualified candidates with proven capabilities. In addition to a higher level in confidence in the candidates identified, the TBG process has the benefit of:
 - Significantly reducing personal evaluation bias.
 - Leveling the playing field for all candidates regardless of background.
 - Being very effective in sorting out those applicants who are much better at “getting a job” than “doing a job.”

TBG Staff:

- Dr. Bill Bryan, CEO
- Ms. Nora Behrens, Project Director
- Dr. Kathy Cuddy-Egbert, Senior Consultant

Kickoff Meeting (2/3/23)

Presentation to the Board and Advisory Members:

- Walkthrough of the process/steps and behavioral technology employed - with supporting materials.
 - Samples of performance criteria provided.
- Discussed were the limitations of engagement and communication with the Search Committee (SC), Board, and Advisory Members with regard to the NV Open Meeting Law (OML).
 - Only the Search Chair, Regent Arrascada, would be privy to all aspects of the search, engage in every element of the process, and have the final word on whom was to be moved forward after the short and long interviews. The SC, Board, and Advisory Members would only have access to candidates’ names, application materials, and contact once the finalists were identified.
 - Those with access to candidate information were required to sign a non-disclosure agreement (NDA).
 - Names and specific demographics could not be made available due to the negative impact if made public, i.e., potential candidates would not apply if their candidacy were known and if their interviews were made public.
 - It was recognized this lack of ability to share information was not ideal but was required due to the OML.
- Responses to questions and concerns were provided.

Development of Selection Criteria

Types of criteria sought:

- Roles - the most important hats that must be worn well by the Chancellor to be successful

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- Competencies - the knowledge, skills, talents, and dispositions that are required for the roles to be executed at a high level.
- Functional Leadership Styles - unique constellations of positive thoughts, feelings, behaviors, and competencies that also support role execution.
- Derailers - factors that guarantee failure in the position regardless of the level of role, competency, and leadership style proficiency.

Sources of Data for Criteria Creation

- Two separate surveys of the Board and Advisory Members were conducted.
 - 27 participated in the first survey and 15 in the second survey.
 - The information provided was detailed, high-quality, and very useful in creating the criteria.
- Conversations were held with knowledgeable stakeholders.
- Position research was conducted re: chancellor requirements and success factors in other states, to include active searches.
- NSHE documentation was reviewed - mission, values, strategic plans, etc.
- The TBG library of research-based roles and competencies of top performing executives across all major sectors was sourced for task and behavioral indicators.

Results

High Level:

- The position needs a strong leader who can create and gain buy-in for a compelling and unifying vision. Leadership ability was viewed as more important than higher ed knowledge per se. You were looking for a leader who can develop strong, enduring, and productive relationships with:
 - Regents, individually, and as a board
 - Institution presidents
 - Legislature and public officials
 - Faculty Senate
 - Business - workforce development
 - NV K-12 education

Selection Criteria Specifics:

- Note: in Dr. Bryan's 45 years of assessing leaders and creating high-performing leader criteria and models, no two have ever been the same due to differences in organization goals, key stakeholder needs, and the culture of the system and broader ecosystem. Hence, the NSHE Chancellor selection criteria were developed for NSHE are unique and capture what is required for superior versus average performance
- To give the criteria high-utility, each is provided with a definition and measurable indicators.
- Due to the proprietary nature of the descriptions and the OML, the full depth and breadth of the criteria were not shared nor made public.
- The following describes the different types of criteria developed.

Critical Roles

1. **LEADER:** *Creator and implementer of a vision and goals to guide the effort of others in the service of meeting system goals.*
2. **COMMUNICATOR:** *Provider of relevant and timely information essential for the effective functioning of the higher education system.*

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3. **PARTNERSHIP BUILDER**: *Builder, maintainer, and enhancer of targeted internal and external partnerships that support mission fulfillment and specific goal attainment.*
4. **COMMUNITY ENGAGER**: *Creator of opportunities for community engagement and decision-making leading to mutual benefits for all involved.*
5. **TEAM BUILDER**: *Combiner of people into effective work groups for the purpose of meeting specific goals and energizing and motivating them towards goal attainment.*
6. **DEI ADVOCATE**: *Keeper of the system's moral and ethical compass when it comes to ensuring equity, inclusion, and diversity practices are in place and functioning at a high level for all stakeholders.*
7. **RESULTS DRIVER**: *Promoter of a vision and plans that energizes all parties to focus on what's most important for meeting essential system goals.*

Essential Competencies:

1. **LEADERSHIP**: *Creates a compelling vision and goals that inspire, and provides clear guidance on how to attain them.*
2. **COMMUNICATING**: *Communicates well in both the written and spoken word to inform, educate, and influence others, and is highly engaging when doing so.*
3. **BUILDING TRUST & CREDIBILITY**: *Employs a suite of positive influence strategies and skills to build trust and gain respect and buy-in of others.*
4. **RELATIONSHIP BUILDING**: *Creates successful and enduring strategic relationships with influential stakeholders and groups to facilitate the attainment of system goals.*
5. **POLITICAL SAVVY**: *Reads the political landscape to stay ahead of potential obstacles to goal attainment and to identify individuals and groups with clout that can be worked with to support the mission and goals of NSHE.*
6. **COMMUNITY ENGAGEMENT**: *Actively engages and builds effective working relationships with community members for the purpose of supporting system goal attainment.*
7. **BIG PICTURE ORIENTATION**: *Makes decisions and plans based on an accurate assessment of how they will impact the present and future functioning of all key system elements.*
8. **PROBLEM SOLVING**: *Proactively identifies current and potential issues and problems and selects the best vehicles for solution identification and implementation.*
9. **PROFESSIONALISM**: *Demonstrates ethical behavior and a genuine concern for the well-being of others under all circumstances.*
10. **INTEGRITY**: *Demonstrates honesty, respect, and objectivity in all circumstances – maintains positive values even under duress.*
11. **VALUES DIVERSITY**: *Promotes diversity and equity practices through personal example and the creation and support of DEI programs.*
12. **ADAPTABILITY, FLEXIBILITY, & RESILIENCE**: *Rolls with the punches while maintaining balance and a focus on goal attainment. (Note: it was found more effective to combine Resilience with Adaptability & Flexibility than employ it as a separate Competency.)*

As noted, each of the Roles and Competencies have detailed, validated, and measurable indicators associated with them - typically 7 to 15. These are what were measured when employing all the screening vehicles, i.e., application materials, short storytelling interview, long story-telling interview, reference checks (in progress), and in the many informal

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conversations with TBG staff. As an example of this, provided below is a sample of the indicators for *Competency 3 - **Building Trust & Credibility***. This was selected as an example given how many times TBG heard this as being essential for Chancellor success:

Behavioral Indicators:

- a. Demonstrates deep listening and empathy with stakeholders.
- b. Demonstrates compassion and a genuine concern for the well-being of others.
- c. Recognizes everyone’s need to be heard, valued, and cared for – and works to address those needs.
- d. Intentionally takes actions to build trust with stakeholders.
- e. Connects with others easily; is personable.
- f. Responds to questions and concerns in a timely fashion.
- g. Follows through on promises and commitments.
- h. is able to listen and thoughtfully respond to divergent viewpoints.
- i. Demonstrates a willingness to learn from others regardless of differences.
- j. Makes self visible and accessible throughout the system.
- k. Is very intentional in breaking down barriers to effective working relationships.
- l. Stands up for his/her staff; has the backs of cabinet members and presidents.
- m. Never throws people under the bus - disciplining is done in private.
- n. Doesn’t have to be the smartest person in the room.

Functional Leadership Styles

- There are eight well-validated leadership styles, with four being highly functional and four being highly dysfunctional. The four listed below are very impactful, but are only effective if used when required. The four are INFLUENCER, CAPTAIN, CONVENER, AND COACH. The order reflects the relative importance of the styles for the NSHE Chancellor position. In some cases, indicators were added and the order of indicators changes to best meet Chancellor requirements.

<p>I. INFLUENCER: <i>Employs a variety of <u>positive</u> influence strategies and skills to motivate/inspire, gain compliance, and meet goals.</i></p> <ul style="list-style-type: none"> a. Knows how to get things done - applies the right influence strategy at the right time to get results. b. Is “street smart” - understands what makes individuals and organizations tick and how best to relate with them. c. Reads the political structure of organizations and situations accurately - who has the power, and uses that to create effective influence strategies. d. Is very intentional is creating influence goals and plans, and executing them with an acute sense of timing – knows what will work and when. e. Builds coalitions & strategic relationships to meet goals - Uses connections to get things done. f. Knows how to inspire confidence and the desire to achieve. g. Adjusts influence strategies and interpersonal style to fit the audience and situation. 	<p>II. CAPTAIN: <i>Leads through the setting of clear, concise, and compelling goals and performance expectations.</i></p> <ul style="list-style-type: none"> a. Creates a clear a compelling vision that guides efforts at every level. b. Provides very clear goals and direction – maintains a firm hand on the rudder. c. Possesses and implements short, medium and long-term plans and goals. d. Ensures that position responsibilities and accountabilities are clear and well-understood. e. Maintains a consistent approach to managing others. f. Is firm and fair in dealing with others. g. Delegates appropriately - provides the “why” and “what”, and allows those supervised to determine the “how.” h. Solicits input, but makes the final decision (with Board guidance when appropriate). i. Does not shy away from tough decisions. j. Recognizes own influence strengths and limitations in any situation. k. Knows when it is better to back off to fight another day. l. Stands up for own employees.
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<p>III. CONVENER: Leads through consensus building.</p> <ol style="list-style-type: none"> Shares the decision-making process; includes stakeholders in the decision-making process when they have a vested interest in the outcome and/or can lend knowledge and expertise to the process. Involves others in decisions based on expertise and/or for development and empowerment purposes. Facilitates the team/group consensus based on a deep understanding of each of the participants and the overall group dynamics. Sets goals, creates plans, and solves problems in as participative a fashion as possible- when feasible and reasonable given the circumstances. Balances the need for team process and task accomplishment against the outcome requirements and time horizon. Convenes meetings or teams as necessary to work on consensus based decision-making; does <u>not</u> use consensus building when the job can get in a more expeditious fashion by employing only one or two people to accomplish the required tasks. <p>DOWNSIDE WHEN USED TOO MUCH – CAUTIONS (typically, this style is overused by education leaders)</p> <ol style="list-style-type: none"> May spend too much time in meetings. May maintain consensus decision making even when not appropriate – may not assert self – be too passive. May put team process ahead of task accomplishment. May bog down decision-making in team process. May create and/or employ teams to handle almost every situation and work demand – even when not required. 	<p>IV. COACH: Is focused on individual and team growth and development.</p> <ol style="list-style-type: none"> Demonstrates a genuine concern for the well-being and growth of others. Makes self highly accessible. Goes the extra mile to assist others to meet goals. Views role as a developer of others – individuals and teams. Provides candid and balanced performance feedback. Provides resources to assist in professional development. Encourages and inspires others to perform at their best and to take on stretch goals. Encourages reasonable and calculated risk-taking. Empowers others by giving them permission to try new tasks and behaviors Allows others to fail (within reasonable limits), and uses failure as learning to improve performance. Customizes his/her approach to best fit the needs of each person and team he/she is assisting.
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Derailers

FAILURE FACTORS

<p>1. STUCK IN THE PAST:</p> <ul style="list-style-type: none"> Assumes anything different from own past experience is bad. Pushes own agenda versus learning what's important to different stakeholders and acting accordingly.
<p>2. NOT NEVADA SAVVY:</p> <ul style="list-style-type: none"> Inability to grasp Nevada-specific concepts. Unwilling to learn what is important about NSHE and the state. Does not build an understanding of the NSHE and NV culture and traditions into decision making.

DYSFUNCTIONAL LEADERSHIP STYLES (In the order of most to least damaging for NSHE.)

<p>V. HAMMER: Leads through intimidation and fear.</p> <ol style="list-style-type: none"> Intimidates to get his/her way; uses fear to motivate. Does not take others' feelings into account when making decisions or taking action. Believes it's important to let people know who's in charge. Demonstrates control over all aspects of both what and how work gets done. Takes disagreement as a challenge to his/her authority - gets defensive. Values compliance over creativity or competence. Views a lack of compliance as a lack of loyalty. Values loyalty over competence. Is stubborn – must get his/her own way. Is clueless to what it means to be a servant leader. 	<p>VI. COWBOY: Ego driven leadership.</p> <ol style="list-style-type: none"> Is overly concerned with status and his/her personal image. Likes to be the center of attention – seeks the limelight. Is unaware of own limitations. Is thin-skinned – personalizes feedback. Is unaware of or doesn't care about his/her impact on others. Views people as poker chips - to be used, spent, and discarded as necessary to meet personal goals. Shoots from the hip when it comes to decision-making. Puts more value in the speed of a decision than in the quality of a decision. Values intuition over data – often lacks objectivity. Does not display due diligence, even in critical situations. Has little compunction about breaking rules, laws, codes, traditions, or ethical standards to meet own needs/get own way. Is inconsistent. Supports the good old boy or girl networks.
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<p>VII. LONER: Leads by passive modeling of what is expected; does his/her own thing.</p> <ul style="list-style-type: none"> a. Doesn't understand what it means to be a leader. b. Puts process and tasks before people. c. Is not in touch with employee needs. d. Demonstrates more interest in task and technology than in people – has difficulty connecting with people at a meaningful level e. Sets high standards - sometimes too high for the time and resources available f. Demonstrates an attitude of keep up or get out. g. Expects people to find ways on their own to meet goals and to improve their performance. h. Gets frustrated or angry when others don't perform up to his/her expectations. i. Becomes unpleasant or coercive under stress. j. Spends little if any meaningful time coaching and developing others. k. Does not take the time or use appropriate influence strategies to build buy-in for change. l. Prefers to work alone versus as part of a team. m. When things go wrong, it is always someone else's fault. 	<p>VIII. FRIEND: Values relationships more than getting the job done.</p> <ul style="list-style-type: none"> a. Doesn't understand what it means to be a leader. b. Is inconsistent. c. Is unreliable. d. Has problems making decisions. e. Does not give clear direction. f. Runs hot and cold. g. Doesn't provide clear direction – plans, goals, and performance expectations h. Is uncomfortable giving performance feedback. i. Focuses more on feelings than performance. j. Puts running smoothly ahead of meeting goals. k. Does anything possible to keep from ruffling feathers - avoids conflict. l. Doesn't maintain appropriate boundaries re: boss versus those supervised. m. Has a tough time saying no. n. Needs to be liked. o. Is taken advantage of. p. Spends a lot of time in non-productive schmoozing. q. Plays favorites. r. Is often blindsided by office and organizational politics. s. Is satisfied with the status quo.
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Position Description and Recruiting

BOARD, SC, AND ADVISORY MEMBER MEETING (3/16/23):

TBG met with the Board and Advisory members and received permission to move forward with:

- The Role and Competency Criteria.
- The Leadership Profile.
- The Application Package.
 - Cover letter/letter of interest
 - Four letters of reference (within the last six months)
 - Four philosophy statements: Leadership, Management, Education, and DEI
 - Resume or CV
 - Credentials, e.g., degrees backed by transcripts
- The recruiting strategy:
 - This included the approval to *encourage diverse and non-traditional candidates to apply.*

RECRUITING STRATEGY SPECIFICS:

- In addition to the documents noted above, a two-page position marketing brochure was created for distribution.
- Paid position postings were made in the following publications:
 - Chronicle of Higher Ed
 - LinkedIn (was the most productive in generating applicants)
 - Career Builder
 - HigherEdJobs.com
 - InsideHigherEd.com
 - DiverseJobs.net
 - DiversityInHigherEd.com
 - Women in Higher Education
 - HERS Network
 - WomenAndHigherEd.com
 - Hispanic Outlook
 - BlacksInHigherEd.com

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- New York Times Online
- Additional postings and brochure distribution:
 - NSHE website.
 - TBG website.
 - TBG's 2,500+ email contacts.
- Passive candidate recruiting/headhunting (those people not actively seeking a position).
 - The postings requested nominations.
 - Networking.
 - Outreach to 140-150 higher ed executives in 11 western states - to stimulate interest in the position and generate nominations, e.g., the President of ASU provided three names.
- TBG inducement to apply:
 - It did make a difference in securing applications that TBG offered to provide evaluation feedback if and when a candidate was eliminated from the process.
 - In July, Bill will be holding debriefing sessions with approximately 20 applicants.

Recruiting Results

OBSTACLES ENCOUNTERED: These are the factors (evidence-based) that discouraged people to apply for the Chancellor position and are listed from most to least detrimental.

1. Board of Regents and Chancellor Struggles:
 - The first question of potential and actual applicants addressed whether or not the apparent dysfunction could be changed. After discussion, some chose to move ahead with their applications, and some didn't. We know from networking that there were others who did not apply and did not contact us.
2. The Late Start to the Process:
 - In the typical ed hiring cycle most of the leadership openings are posted in the fall and filled by March. Many of the more traditional candidates had already secured a senior leadership position by the time we started.
3. The Lateness of the Search Conclusion (June):
 - There was a concern for the welfare of the organization the applicant would be leaving re: lateness of notice and ability of the organization to fill the position.
 - For example, Bill had a number of discussions with a very successful university president who really wanted to apply, but just felt that ethically he could not move forward given the potential negative impact on his current employer of leaving on short notice.
4. The Quickness of the Position Start Date:
 - Concern expressed there was no time to get their life in order from the time chosen to the time starting, i.e., only a few weeks.
5. The Compressed Search Timeline:
 - Some concern that there wasn't sufficient time to meet application requirements - TBG was liberal in providing extra time when this concern was expressed.
6. More Rigorous Application Requirements than Typical:
 - This included having written references and completing the four philosophy statements.
 - Some we spoke with felt they should be given a "pass" on these given their current position/status.
 - TBG explained why they were required and that they were not just busywork.

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- This may have turned away a few, but we do know that those who chose to apply who did not like the requirement did not even make the first cut.

RECRUITING AND SCREENING OUTCOMES:

There are obstacles with every search, and even given those described above, we were very pleased with the number and quality of the candidates! TBG spent many, many hours recruiting and speaking with potential applicants and coaching and supporting those who did apply.

- There were a number of interested applicants that we told immediately not to apply given their lack of qualifications.
- The total number of applicants providing a resume: 87
 - This included 6 international applicants who were not considered due to work permit issues.
- The total Number of applicants that completed the full application package (beyond the 6 international applicants): 29
 - They were from 18 different states, including 6 from Nevada.
- After application packet screening: 15 remained
- After short interview screening (up to two hours each): 6 remained
- After long interview screening (up to four hours each): 3 remained - your finalists!

Candidate Screening Process**CONTEXT**

- With regard to the application packet, the importance of the information presented in revealing the possession of the role, competency, and leadership style proficiencies is as follows (most important to least):
 - Cover Letter
 - Letters of Reference
 - Philosophy Statements
 - Resume/CV
 - Credentials - Degrees, etc.
- You may be surprised how low on the list resume/CV is. This is because it really only provides the context for the demonstration of capabilities/selection criteria, and not how well the applicant performed with regard to those criteria. **Experience is often not correlated with competence (the same holds for charisma)!** When accomplishments are listed, there is no way to know the degree to which the applicant was responsible for attaining those accomplishments. There is often a lot of hype in resume's/CVs. On the other hand, the demonstration of key criteria can be identified by a close analysis of the cover and reference letters. TBG has a 7-page set of guidelines for analyzing applications for the demonstration of selection criteria, most of which the general public is totally unaware of.
 - **TBG rejected a number of applicants who many would consider as having "better" resumes/CVs than the three finalists. They were rejected because they didn't possess the selectin criteria required, regardless of the number and type of positions held, or accomplishments listed in the resume/CV. What counts the most is validated capabilities and performance, not paper.**

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COMPLETED ACTIVITIES:

- An evaluation form was created that included all the selection criteria described earlier. For evaluation consistency and reliability this form was used with every screening activity - application, short interview, long interview, and reference checks.
 - The evaluation was on a 7-dimension scale, i.e., from None to High.
 - The score given was based on the number and frequency of indicators observed for each of the selection criteria, with the most weight given to those criteria demonstrated in the short and long interview stories.
 - TBG's Guided Storytelling Interview (GSI) is *the only interview technique* that accurately assesses the current level of criteria proficiency and the degree to which criteria are scalable and will be demonstrated in the future.
- TBG did all the application scoring, with Search Chair Arrascada approving those moving on to the short interview.
 - Search Chair Arrascada participated in most of the 15 short interviews (2-hour) and all of the long interviews (4-hour). He became a very accomplished evaluator. He had the final say on those candidates identified as finalists, which was a highly-informed decision. When considering the time spent preparing for, conducting, and scoring the 21 interviews, the number of person hours was well over a 100.
 - ***The three finalists are different in many ways, but what is critical is not their differences, but the fact that all three scored highly on the demonstration of the role, competency and leadership style criteria, and very low on the demonstration of "Derailers."***

EVALUATION ACTIVITIES IN PROGRESS:

- TBG is:
 - Completing the reference checks.
 - Reference checks are essential, since the prior screening activities described may not uncover derailers that reference checks will, particularly with regard to negative Leadership Styles, i.e., Hammer, Cowboy, Loner, and Friend.
 - Completing the background checks.
 - Creating finalist evaluation guidelines for the SC, Advisory Members, and Full Board.
 - Creating the online survey for anyone who wishes to provide their observations of the candidates based on reviewing their online application materials and their forum presentations.
- The results of the above will be provided on Thursday during Meet & Greet activities in Las Vegas.

[PLEASE TAKE TIME TO REVIEW THE FINALIST EVALUATION GUIDELINES.]