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Preparing to Meet the Board

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You've been through the preliminary interviews, and it's clear this is the nonprofit you want to lead. You're passionate about the mission, full of ideas, and impressed by the chemistry of the senior team. That corner office on the executive floor is nearly within reach; you're one of the finalists invited to meet the board. Now what?

Research

As soon as you finish congratulating yourself on your progress so far, you'll want to assess what you've learned and what you need to know for this last interview. The search consultant, whose job is to be a liaison between candidates and the search team, can be an excellent resource in helping you get ready, but the preparations that follow will never be wasted.

Start with the all-important mission. Make sure you have a deep understanding of the organization's purpose and the group it serves—and keep both in sight at all times. If it's an association, learn everything you can about the membership. If you're interviewing with a service provider, try to get a sense of each segment of its target audience and their relationship to the organization.

If the organization has a strategic plan, it should offer critical information about priorities over the next few years. One hopes the plan will be in active use as a guide and tool for evaluation, but that's not always the case, so be alert for a disconnect. If there is one, try to find out what it indicates.

Another area to investigate is financial health. If you haven't seen the most recent audit, request a copy. Above all, you're looking for the assurance of a "clean" opinion letter, but deduce what you can from the ratios of assets to



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liabilities and program to operating expenses. Tax returns, available at Guidestar.org, will provide similar information, but it will be a few years old.

Ask who will be interviewing you, and investigate them. Your findings will help you understand people in key positions of responsibility and allow you to tailor your comments to your audience.

Plan

Alan Wichlei, a vice president and director at the search firm Isaacson Miller, says most search committees start with questions about the candidate's background. This is important because it allows you to provide reference points for what you will say later. If the committee doesn't ask for background, you may want to volunteer it early on. Wichlei suggests, "Prepare a concise personal bio that includes each institution where you've worked, why you went there and why you left, and your major accomplishments. End it with the reason you are looking for this opportunity." Be sure to balance your use of "I" and "we" to show how much you appreciate your team, and ready yourself with examples and data if the committee asks for more information. Keep it brief though, unless you're responding to questions. Wichlei offers the caveat: "We've never heard a candidate say anything so compelling that the search team wanted to hear more than five minutes of it."

For examples of the kind of open-ended questions search teams are encouraged to ask, look in the "Hiring Toolkit" at Bridgestar.org, the website for the talent matching nonprofit Bridgestar. Think through your responses to these questions, and practice your answers aloud—away from the office.

You'll want to consider what type of leadership is likely to serve the organization at this point in its evolution. Does it need a charismatic, external executive or someone whose first priority will be operations and structure, an innovator or a protector? You should have clues from initial interviews and the job



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posting. Examine the match between your leadership style and what's needed, and let your conclusions inform your remarks.

One of the most important things to think through is your vision for the organization. It needs to demonstrate that you will be inclusive and you'll follow a reasonable flow from the present to the future. Tie your vision to your experience to show how your background informs your readiness to lead. If you are asked only about experience, create an opening to talk about vision by saying, "This experience leads me to think that..."

Plan a few questions for the search team, but don't steer the focus too far from yourself. You want interviewers to look back and feel they've gotten to know you. Alan Wichlei cautions, "The end of the interview is not the time to make the committee anxious about problems. Ask your toughest questions first, then move to their hopes, aspirations, and goals."

Richard Moyers, author of *The Nonprofit Chief Executive's Ten Basic Responsibilities* (BoardSource, 2006), encourages candidates to ask for the board's ideas about a successful partnership between themselves and the chief executive. He says, "The most effective executives accept a great deal of responsibility for ensuring that the board is successful. The interview is the first glimpse at what the dynamic with the board might feel like—and whether it's tenable."

Last, decide how you'd like to leave the meeting. Outline a summary statement, but be ready to modify it to reflect the dialogue in the interview. You'll want to thank everyone for meeting with you and to affirm your interest in the position.

Remember that your goal in the interview is to demonstrate a leader's easy comfort with a wide range of material. Hone your ability to be spontaneous with what you know. Practice your delivery with someone who'll give you productive feedback.



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Present

Relax. You've prepared as well as you can; it's time to trust yourself to behave like the leader you are. Rely on your vision, confidence, and responsiveness to inspire a sense of security in the interviewers. You and the board are negotiating a commitment to the future of the institution; look to its purpose and the people it serves to draw you together.

Be attentive and receptive. Throughout the interview, try to employ a facilitator's calm alertness. Are the participants engaged? What do their questions tell you about their concerns and aspirations? Do you sense anything that needs to be addressed? Do you need to ask for clarification before answering a question?

If it doesn't work out....

A great interview doesn't guarantee you'll be chosen for the job. If you're not, invite feedback, but be aware that the choice may hinge on factors unrelated to your performance. Consider that you can't force a match. It's better to find out now that you're not the candidate this board wants than to find it out six months after you've moved into that corner office.

Good luck!