

HIRING GUIDE

FOR EXECUTIVE AND SENIOR OFFICER SEARCHES



WESTERN MICHIGAN
UNIVERSITY

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SEARCH

This manual is available to provide guidance for Western Michigan University stakeholders with respect to facilitating successful executive searches involving key administrative and academic leadership positions.

This information is meant to assist and align consistency as leaders strategically navigate the search process.

1.

Purpose of this guide

COLLABORATORS:

Gretta Clay

Director, Human Resources Services

Michelle Hruska

Executive Assistant Senior to the President

Ivanna Lajara

Graduate Assistant, Office of the President

SPECIAL THANKS TO:

Dr. Warren Hills

Associate Vice President for Human Resources

Tony Proudfoot

Vice President for Marketing and Strategic Communications

Colleen Scarff

Executive Director, Budget

Dr. Evelyn Winfield-Thomas

Executive Director, Institutional Equity

Dr. Donna Talbot

Chair of Educational Leadership, Research and Technology

Dace Copeland

Business Manager Senior, Office of the Provost

Cathleen Smith

Business Manager Senior, Office of the Provost





A FOUNDATION FOR SEARCHES



MISSION

Western Michigan University is a learner-centered, research University, building intellectual inquiry and discovery into undergraduate, graduate, and professional programs in a way that fosters knowledge and innovation, and transforms wisdom into action. As a public university, WMU provides leadership in teaching, research, learning and service; and it is committed to enhancing the future of our global citizenry.

VISION

Nationally and internationally recognized, the University aspires to distinguish itself as learner centered, discovery driven, and globally engaged.

LEARNER CENTERED

Every member of our community is responsive to and responsible for the education of our students. We challenge and engage all members of our community with a university experience that creates skilled, life-long learners.

DISCOVERY DRIVEN

WMU offers experiences that enable discovery, and promote creativity and research. We are committed to pursuing inquiry, disseminating knowledge and fostering critical thinking that encourages life-long learning. Our scholarship creates new knowledge, forms a basis for innovative solutions, leads to economic development and makes substantial contributions to society.

GLOBALLY ENGAGED

We are a community of learners committed to human dignity, sustainability, social responsibility and justice. Our campus embraces a diverse population of students, faculty and staff who develop learners and leaders who are locally oriented and globally competent, culturally aware and ready to contribute to world knowledge and discovery.

Transformational priorities

President Montgomery outlined three transformational areas to consider as WMU becomes the University of Choice. These priorities should be strategic focal points throughout the search process: retention, revenue, and reputation.

How do these focal points impact the search process for academic and administrative leadership?

RETENTION

Prior to the onset of the search, a hiring agent should review WMU's mission statement and strategic plan. Enrollment is a shared endeavor influenced by all stakeholders.

This step provides important information to help focus the search and recruit ideal candidates.

REVENUE

All WMU leaders are stewards of resources provided by state and federal governments, lenders, private donors, families, and students. Leadership roles have gravitated significantly toward responsibility for developing entrepreneurial partnerships that explore new sources of revenue.

REPUTATION

WMU has a long track record of research, teaching, and global engagement. We are both an academic powerhouse and a vital economic and human service force in our region and beyond. For this reason, candidates should display both sharp knowledge of our reputation and enthusiastic interest in our sustainability. To learn more about our \$1.6 billion dollar impact on the community, read our 2018 Community Outreach Report, a link is available at wmich.edu/president/search.

Leadership Skills Critical for Driving Change

Excerpt of Brent Gleeson, Contributor at Forbes.com

All organizations experience periods of much-needed change in order to grow, compete and win. Changing or improving the culture of a team requires focus, accountability and consistency, and it must be led from the top. Without total and complete buy-in from the senior leadership team the desired culture will fail to be achieved.

Leaders must be honest in their effort of exhibiting true passion for change, taking strides to master three critical culture change leadership skills.

Leading the change: The senior leadership team must actively manage the process and make sure that transformation is at the top of their priority list. Some of the best practices leaders must own include: establishing accountability across the organization, defining expected results, developing and communicating the case for change, and consistently ensuring alignment across the leadership team.

Responding to feedback: Senior leaders must ask their teams for feedback, creating a culture supportive of managing up and transparency.

Facilitative communication style: For teams to adapt and transform in rapidly changing environments they require effective communication. Leaders must create experiences that foster ongoing collaboration and communication.

WMU Executive and Senior Officer Searches will involve the following stakeholders

Who is involved in the process and how?

- Board of Trustees has fiduciary oversight for executive searches and hiring authority for presidential searches.
- Office of the President has the hiring authority for executive and senior officers, such as vice presidents, the Provost, the Athletic Director, and other direct reports to the President.
- Human Resources ensures an objective, organized, and lawful process.
- Office of Academic Affairs has the hiring authority for all academic search processes.



- Office of University Budgets and Financial Planning ensures correct use of updated budget model.
- Office of Institutional Equity provides implicit bias training and ensures compliance with Equal Employment Opportunity (EEO) policies.
- The Search Advisory Committee ensure a fair, successful search process and provide feedback for decision-making. This committee is a formal representation of stakeholders from across campus— and the community when appropriate.
- Hiring division is responsible for tracking and allocating expenses for the unit/division and on-boarding the executive after the candidate has completed the process with HR.

Everyone involved in the search process should comply with the following statements:

Confidentiality

Generally, the search process will be made public to the University community, and search committee members and representatives will keep their constituencies apprised of the progress of the search. However, confidentiality is essential when it comes to search candidates, especially at the early stages of the search process. However, confidentiality is essential, especially at the early stages of the search process.

Such confidentiality attracts the best candidates, many of whom will only agree to be considered under such circumstances, and to preserve the integrity of committee deliberations throughout the process. Refer to the Search Advisory Committee Confidentiality Agreement for further details.

DUE DILIGENCE

Thorough and careful due diligence, background checks of top candidates are absolutely necessary. To ensure a successful hire, it is vital to carefully review application documents, credentials, personal histories, and verbal and written statements. Please be aware that background checks can take two or three weeks prior to finalizing the hire.

Timing and search planning

The following is a typical timeline of an executive search:

Regular updates to Human Resources should be done throughout the process.



2.

Beginning the search

**Budgets and
Financial Planning**
(269) 387-4275
wmich.edu/budget

Budgeting

The Office of University Budgets and Financial Planning has a primary goal: to ensure funding mechanisms for executive and senior officer searches are consistent across executive hires, and funds are available for the process.

The department works with the hiring agent or a representative from the hiring department to determine the fund and cost center funding the hiring process.

Refer to the University Moving Expense Policy and the Reauthorization by Accounting Services for funding policies.

Once the candidate is hired, it is the responsibility of the hiring unit to fund all expenses. If the hire will cost more than the amount budgeted, the difference will be funded by the executive area or department.

If the position hired costs less than the amount budgeted, the difference will be directed back to the hiring department.

In cases where there are unique agreements or special situations, these should be discussed with the vice president or president prior to execution.

Requests to have a position and compensation plan created or reviewed must be approved by the leader responsible for the division and the Office of University Budgets and Financial Planning.

Hiring agents should first contact the Office of University Budgets and Financial Planning to request a Position Authorization form.

Following this step, complete the form and collect all appropriate signatures. The position description and advertisement information should also be attached. The President's signature is only required for hiring at the Vice-Presidential, and Athletic Director level.

Once the signed Position Authorization form arrives at Human Resources, the hiring agent will be contacted by an HR representative. After this form is submitted and approved, hiring agents may also develop and publish their advertisements.

Moving Pre-Authorization:

wmich.edu/sites/default/files/attachments/u332/2015/moving_expense_form_0.pdf

Moving Expenses Policy:

wmich.edu/sites/default/files/attachments/u218/2014/moving_expense_policy.pdf

PA form and detailed process:

wmich.edu/hr/forms/compensation

Creating a search website

To ensure we engage multiple groups of stakeholders, a search website should be created with details about the position and the search process.

Positions should be posted on HR's online Applicant Tracking System before being advertised the position, a posting number will be required.

The search website includes:

- The approved position description.
- An outline of the search process.
- A form through which stakeholders can provide their insights and feedback on the candidates.
- The Search Advisory Committee members and their current roles at WMU.
- A mechanism to contact the Search Advisory Committee Chairperson and/or the search firm.

More information on how to create a search website is available at wmich.edu/cms.

Selecting a search firm or consultant

In many cases, a trusted search firm or consultant will be an important partner in this effort. It is best the search firm specialize in the higher education industry and has access to a large pool of qualified candidates.

Working with a search firm is a process that is best directed by Human Resources.

ADVOCACY FOR HIRING A FIRM

- When the University wants to expand the candidate pool and increase its chance of finding qualified candidates.
- When the University wants to connect to and attract a larger and more qualified pool of those candidates—those who may not be actively seeking for a new job at a national level.
- When the position is new to our organization or a current position is being restructured.
- When the leadership role is beyond internal expertise, or a specialized profile is required.

Initial screenings of applications often begin immediately by the firm and continue until an appointment is made. Individuals who wish to nominate a candidate should refer to the search website for instructions.

All candidates are still required to apply through the WMU online Application Tracking System, even when the search firm is responsible for the process.

TYPES OF SEARCHES

Open searches ensure all steps of the process are open to the public, including candidacy.

Closed searches protect candidates' identities and are common for executive and senior officer searches, as well as presidential searches.

Hybrid searches use a mixed approach where the confidentiality of candidacy remains until the final candidates are selected, and the University is ready to evaluate them and make a final decision.

Once the finalists are ready to be interviewed on campus, then their identities and profiles will be shared with the public.

University policies and procedures

According to our HR policies and procedures, all appointees to full-time executive official or senior administrative officer positions require WMU Board of Trustees approval. The complete manual can be found at wmich.edu/hr/policies/manual.



Forming the search advisory committee

WHY IT'S IMPORTANT TO ESTABLISH A SEARCH COMMITTEE

Search committees are an important and powerful expression of WMU's shared governance model for decision-making. As key stakeholders, their involvement deepens the shared commitment to the institution's mission and vision. Effective Search Advisory Committees add value and contribute significantly to better hiring decisions. Hiring decisions are complex, multi-dimensional, and involve important priority choices and subtle trade-offs. Multiple perspectives provided by the Search Advisory Committee add important insight and thoughtful nuance to the decision-making process.

FORMING A COMMITTEE FOR SUCCESS CHECKLIST

Committee chairpersons often hold peer or senior positions

- ☐ to the vacant position.

Committee members might include supervisor, peers and

- ☐ customers to the position, undergraduate and graduate students, faculty, staff, alumni, community members, consultants or other professionals.

Members should demonstrate knowledge of both

- ☐ the leadership role and broader impact on the campus community.

Consider including a Diversity Advocate, a person with

- ☐ demonstrated competencies to serve the role, and who has completed the two-hour training for implicit bias from the Office of Institutional Equity.

- ☐ Ensure understand the time commitment for a successful process.

HR acts as a consultant to the search committee.

- ☐ A template invitation email can be found at wmich.edu/president/executive/hiring
- ☐

VALUABLE IN SEARCH COMMITTEE MEMBERS

- Good judgment and the respect of the University community.
- General understanding of the position and the current expectations for the role.
- Accepting feedback and input from peers and members of the community.
- Ability to invest time in the search process.
- Capacity to attract candidates and invite them to participate in the process.
- Confidentiality.
- Diversity.

SEARCH ADVISORY COMMITTEE MEMBER DUTIES

- Attend all scheduled meetings.
- Sharing updates on-search process, as appropriate.
- Complete the one-hour Implicit Bias Training.
- Familiarize with the main function, expectations, and relevant details of the position.
- Review all application materials and actively participate in the interview process.
- Provide feedback on all applicants.
- Maintain confidentiality about the process before, during and after the search.
- Ensure EEO and diversity policies and procedures are followed.
- Steward support for the process.
- Assist with candidate visits to campus.
- Assist with welcoming the new WMU leader.
- Other duties as assigned by the advisory committee chair.

Empowering search advisory committees members

Experience has taught the higher education industry that three qualities describe the most effective search committees:

OWNERSHIP—a sense of responsibility for the process of the search, the outcome of the search and the success of the new leader

ENGAGEMENT—a commitment by committee members to do their work well and to participate fully in each step of the search process

TRUST—a sense of confidence and assurance; a belief in the good will and common interest shared by the committee, its members, the institution, and the search consultant

SEARCH ADVISORY COMMITTEE COMMUNICATION

An important ingredient for a successful search is open and robust communication with the hiring agent, within the search advisory committee, and with the community.



3.

The selection process

Online access to documents
and links are available at
[wmich.edu/hr/
supervisorresources/
hiringtoolbox](http://wmich.edu/hr/supervisorresources/hiringtoolbox)

All academic and administrative leadership searches

Formal assessment tools provide predictive metrics for a candidate's future job performance, and identify possible barriers to success.

These tools include:

- Position description
- Interview checklist
- Presentation evaluation
- Lecture-style evaluation
- Reference checks
- Background checks

THE DIVERSITY ADVANTAGE

Diversity at WMU encompasses inclusion, acceptance, respect, and empowerment. This means understanding that each individual is unique and that our differences make our contributions more valuable. Diversity includes the dimensions of race, ethnicity, and national and regional origins; sex, gender identity and sexual orientation; socioeconomic status, age, physical attributes and abilities; and religious, political, cultural, and intellectual ideologies and practices.

Studies support that diversity in leadership roles improves:

- Positive impact on student development, satisfaction and retention.
- Increase student success and engagement.
- Promote student centered practices in the classroom.
- Better preparation of students to live and work in a global society.

WMU EQUAL OPPORTUNITY STATEMENT

WMU is committed to a policy of equal opportunity practices and academic programs. Our firm commitment to the embodied principles means all employees are afforded equal opportunity for participation.

It is the policy of the University to ensure equal opportunity for all training, promotions, transfers and compensation. All decisions will be based solely on merit and qualifications without regard to race, color, religion, national origin, sex, sexual orientation, age, *the universitywide decision-making and student experience in the following ways: disability, height, weight or marital status.*

Institutional Equity policies
and procedures [wmich.edu/
equity](http://wmich.edu/equity)

AFFIRMATIVE ACTION

WMU is committed to a policy of nondiscrimination for all people and, toward that goal, has developed an Affirmative Action Program. The program is designed to ensure that whenever employment decisions and personnel actions are made, the University will make a determined effort to identify and include in all pools of candidates qualified underrepresented racial/ethnic groups, women, disabled veterans, Vietnam-era veterans and individuals with disabilities.

Affirmative Action
policies and procedures
[wmich.edu/equity/
affirmative-action](http://wmich.edu/equity/affirmative-action)

IMPLICIT BIAS TRAINING

Biases, or intentional or unintentional prejudices and preferences, create unfair advantages or disadvantages, and may result in discrimination against an individual or group. The workshop search committee members will participate in is designed to increase awareness of various forms of individual, group and institutional implicit or unconscious biases that are barriers to diversity, equity and inclusivity in hiring decisions and outcomes. Members of search committees will receive information and engage in exercises and discussion focused on different forms of implicit bias and best practice strategies to mitigate bias in the employee search and selection process.

Recruitment tools used by WMU search advisory committee

CLEAR AND DETAILED POSITION DESCRIPTION AND LEADERSHIP PROFILE

*Training is available at
wmich.edu/equity/training*

Leaders making hiring decisions should articulate expected outcomes of a new hire in the first three to five years on the job. The skills needed to be successful will be identified through discussions with the hiring agent, search committee, peers of the position, and direct reports.

The position description that will be publicly shared through the search website should contain:

- University's purpose and vision for this position.
- Primary goals for the person responsible.
- An "About WMU" section with broad history, our mission and vision, and Points of Pride.
- Brief information pertaining to Kalamazoo and the region.
- Summary of the hiring department.
- Major functions and responsibilities of the position.
- Minimum qualifications required.
- Preferred qualifications.
- Salary information.
- Applicant review deadline and search timeline.
- Instructions on how to apply.
- EEO Policy and Affirmative Action Statement.
- Visit HR's website for submitting application materials at wmich.edu/hr/jobs.

Clarity provides the committee with the roadmap for assessing candidates and avoiding challenges arising from biases, conscious and unconscious, or prior personal connections between committee members and candidates.

Tools for Assessing Leaders

INTERVIEWS

The committee must engage in serious vetting. Look at candidates' application materials, talk with trustworthy references, and find ways to ascertain whether the candidates display what the attributes leading to a successful candidacy. At the same time, be aware that the strongest candidates have the most options—the vetting process must be balanced by an equally strong courting process. If the right person surfaces early in the process, find a way to keep that conversation moving

WELCOMING CANDIDATES TO CAMPUS

An interview process is a two-way street; as we evaluate the candidates they are also evaluating our culture, leadership team and campus community.

To ensure that interviewees have a pleasant time and visit, the following list of information could be electronically or physically provided to them prior to or during the first interview:

- Welcome letter by Search Advisory Committee Chair.
- Statement of University's mission, vision and goals.
- History of our institution and current organizational chart.
- Employee handbook.
- Favorable recent articles about WMU, its colleges, departments, alumni and community.

Interview toolbox

INTERVIEWING SAVVY

If you conduct hiring interviews, you should be very familiar with anti-discrimination laws and how to conduct structured interviews that lead to successful hiring decisions. An HR analyst can help you with all phases of the interview process. Visit this site to find examples of lawful, well constructed interview questions, wmich.edu/sites/default/files/attachments/u368/2014/hr-interviewingsavvy.pdf

A recent investigation described four skill categories and looked at how they change across levels. Finding that business acumen and strategic skills seem to become much more important for executives:

- Cognitive skills include problem solving, critical thinking, communication and reading comprehension.
- Interpersonal skills include social awareness and judgment, persuasion and negotiation, and skills in coordinating others.
- Business skills include business acumen and skills in managing financial, material and personnel resources.
- Strategic skills include systems-level perceptiveness and understanding, “visioning,” complex problem solving, and the ability to develop cognitive representations of strategic environments.

Today, a dynamic, fast-paced environment that extends across national boundaries demands a special kind of executive. One can see this clearly in the current emphasis on interpersonal and relationship skills.

Human connections are crucial for building effective teams and multi-level collaborative relationships.

Team members will more likely follow the leader in fast-paced and changing environment if there is a true human connection.

Some describe these human connections as “the ability to move the human heart.” This quality is quite difficult to measure and assess—even in personal interviews.

Please refer to our Appendix for a Model of On-Campus Interview Schedule.

Online access to documents and links are available at wmich.edu/hr/supervisorresources/hiringtoolbox

Decision-making process

THE SEARCH COMMITTEE'S CONSENSUS STRATEGY

At the beginning of every well-run leadership search, trustees, search committee members and consultants spend countless hours identifying what they want to see in the institution's or departments next leader.

Having a detailed leadership profile serves as a road map for the recruiting and selection process.

The leadership profile is, in many ways, a covenant or a contract—a public, explicit list of measurable credentials and qualifications on which the University has agreed.

BACKGROUND SCREENING

Western Michigan University's background screening policy is intended to support the verification of credentials, criminal history and other information related to employment and appointment decisions. The offer of employment is conditional, and contingent upon successful results from the background check. When the hiring department gives the selected candidate the written conditional offer of employment, they must also include the background screening consent materials: The Fair Credit Reporting Act (FCRA) and the Disclosure and Consent Form. The hiring department contacts their HR Rep for the template of an offer letter, and the background screening consent materials.

SENIOR ADMINISTRATIVE OFFICERS POLICY

This document should be included with the letter of offer and background screening consent materials at wmich.edu/hr/policies/officerspolicy

Sources are available at wmich.edu/president/search

SOURCES

www.wittkieber.com/file/thought-leadership/practice/Best%20Practices%20in%20Higher%20Education%20Presidential%20Search.pdf

www.agbsearch.com/resources/increasing-odds-successful-presidential-searches

www.agbsearch.com/newsletter/effective-search-committees-the-why-who-and-how

www.aahea.org/articles/pressearch.htm

www.nyu.edu/content/dam/nyu/facultyGovernance/documents/RepPresSearch31413.pdf

www.acenet.edu/the-presidency/columns-and-features/Pages/Best-Practices-Picking-the-Right-President.aspx

www.shrm.org/hr-today/trends-and-forecasting/special-reports-and-expert-views/Documents/Executive-Talent.pdf



**WESTERN MICHIGAN
UNIVERSITY**

Office of the President

Western Michigan University
Kalamazoo MI 49008-5202 USA

(269) 387-2351

wmich.edu/president

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