

Monday, February 22, 2016. Mary Gorman, Spencer Stuart.

MS. WADE: Good morning to everyone, let's be seated. Let us begin our second part of this morning's session. All right. It's probably not popular to tell adults that children do this a little quicker, but that said, I hope you enjoyed your break and are now ready to sit back and learn from another aspect of innovation.

Travis will introduce our speaker. She will share with us, take questions, and we will follow that by tributes to those who have gone before, concluding our morning session.

One quick reminder. If you're going to the Culinary Institute, the shuttle does leave at 12:45, because you're going for lunch. And I just want to remind you of that, because it's a pretty quick turnaround at noon. So just be kind of thinking about that. And you can also think about Culinary Institute, as well.

So without further ado, Travis.

MS. BROWNLEY: Thank you, Sissy. It's good to see everybody out there.

Mary Gorman joined Spencer Stuart in 2010 after spending more than 20 years working in education. After graduating from an independent school herself -- and for those of you that know Providence, Rhode Island, it was the Lincoln School for Girls -- there you go; exactly -- and Middlebury College she joined Wesleyan University as a two-year administrative intern. After a short hiatus in health care, which I'd love to hear more about, and an MBA at Yale, Mary spent the next 13 years at Phillips Exeter Academy. She describes her day job there at Exeter -- and for those of us who have been in boarding schools, we know we have day and night jobs -- but she describes her day job at Exeter in the finance office as the internal consultant partnering with the principal, the senior leadership team, and the faculty and board on key projects. The proudest moment in her career was partnering with the famous Kendra Stearns O'Donnell and a board member to develop the Academy's first middle-income initiative, which significantly expanded access to the institution.

Like so many of our faculty and staff, she wore many hats. She lived on campus, was part of a dorm team, had advisees and ran the Outings Club.

In 2002 she headed to Dartmouth College, where she served as the associate provost and executive dean in this role. She served as a key adviser to the provost

at Dartmouth on a range of strategic issues, sat on the college's budget committee, and oversaw all new construction, and that is God's work. Really. Even if it doesn't rain all the time.

At Spencer Stuart Mary is part of the Education, Nonprofit, and Government practice. She spends 75 to 80 percent of her time working on search committees at independent schools, colleges, and universities. Mary sees her work in a search as an extension of the strategic work that she did at Dartmouth and Exeter. Her goal is to form a strong partnership with the search committee to get a deep understanding of the school and to help the committee gain consensus around the needs for their next leader.

Today Mary will talk about the journey to headship, not only from the perspective of a search consultant, but also from her rich experience in education. There are many of us in this room who have benefited from a great search consultant and who have themselves taken on this very worthy work to help find our schools' next generations of leaders.

Please join me in welcoming Mary Gorman.

MS. GORMAN: Thank you, Travis, and thanks to all of you for inviting me to come here today.

When Travis and I first talked about this, she asked that we talk in particular about thinking about women and helping women find their path to headship. And I will say, I'll speak about that, and make some very explicit comments about that, but I think a lot of what I'm saying could really apply to all people who are thinking about leading schools, leading their first school, the next school, et cetera.

So it's really a privilege to be here. At Spencer Stuart I do work with a lot of colleges, universities, museums, libraries, and other kinds of nonprofits, but I just feel at home when I get invited to do another independent school search and have that opportunity. So it's a privilege for me to be here today.

Here's the agenda that I thought might be interesting to cover. One is the state of play in particular for women leaders, and also a look at who's leading the current schools in the country. Looking at search committee dynamics and dreams. I think it's really interesting to think about search from their perspective. What's on their

minds when they take on the role? The third is inculcating a culture of talent development in your school, and then I'll get into navigating the search process, and working with search consultants.

The state of play. Well, you know, nationally when you look at where women are in leadership roles, I guess we should feel good that we've made some progress, but there's a long way to go. If you look at Congress, 19 percent of the members in Congress are women. Fortune 500 leaders, 4.6 percent. 20 percent of S&P board members are women. And now 97 percent of boards have at least one woman on it. And I will say that Spencer Stuart does a lot of work in this space and we had a big celebration two years ago when we placed our one thousandth woman on a corporate board.

Some people think that if we were to look in the nonprofit sector, we'd see more optimistic numbers. But that unfortunately is not the case. Of the top 25 foundations by the size of their assets, 20 percent are led by women, and GuideStar reported in 2013 that only 18 percent of nonprofits with budgets greater than \$50 million were run by women. In Silicon Valley -- it was interesting listening to Lori -- again, she talked about the gender gap in terms of engineers and computer scientists, and we also read about that a lot in terms of the leadership in those organizations. So there is work to be done.

However, education is a place where, let's face it, for decades and centuries there have been women leading, and that's largely because there have been girls' schools, and girls' schools have looked towards their headmistresses and now heads of school to have leaders.

So where are we now in education? And I think you can see that there's some good news. In 1975 Lorene Rogers became the first woman who was named the president of a major research university at the University of Texas. In 1994, Judith Rodin broke the glass ceiling in the Ivy League to become the first president. You can see now 50 percent of the leaders at the Ivy League are women. And that's been that way for quite time now. If you look, however, at the provosts, there's only one woman in the provosts in the Ivy League, so think about that as a pipeline.

The liberal arts colleges. This, again, looks at the top ten. We could look at more. Right now 50 percent of the top ten are led by women, and many of them have the first woman president. Middlebury College, my alma mater, we did that search last year and Laurie Patton has taken over the helm. Biddy Martin at Amherst. The

Davidson president. A number of them, the very first women. So very exciting. But there's still some, Macalester, Bowdoin and many more, that have never had a woman sitting at the top of the institution. So there's work to be done there.

The public universities. Two of the top ten public universities have women leaders.

In the independent school world I actually arrived at Phillips Exeter about a year after Kendra Stearns O'Donnell did, and the head in *The New York Times Magazine* was "A Woman in Old Exeter" in 1987, the first woman to lead one of the major boarding schools. And I think certainly progress has been made in leading. Just looking at the faces in this room, you can tell that's the case. At Spencer Stuart, we've put together 100 schools. You know sort of the Forbes list and a bunch of others, a little bit of a dog's breakfast, right, but it's a list that we tend to track. And when we look at that list, you can see 28 percent are headed by women. When we take out the single-gender school, that number drops to 22 percent. And we also track about 55 K-through-eight schools on a number of different levels, and 33 percent of them are headed by women. So you know, there are a lot of theories. Sheryl Sandberg, Rob Neely, Anne-Marie Slaughter -- lots of people have written about this, about why it is that women are not leading organizations, but you know, I truly believe that education should be a leader in this regard. In many ways, there's a history of women running these institutions. The climate and the culture of collaborative decision-making, participatory decision-making, et cetera, really should support women who, research has shown, are more aligned with that leadership role than the top-down that you see in other organizations. Schools, in general, are more family friendly than some other institutions and so I think there's some flexibility there. And also, the pyramids leadership is not that steep. There are so many opportunities, whether you want to be a department chair, a dorm head, a head coach, chair a committee, there are lots of opportunities for women to dip their toes -- women, men, everyone -- to dip their toes in the water and try to lead.

But unlike a lot of organizations, people largely don't come to education because they want to be a leader. They become teachers. They love kids. They love their subject matter. They were inspired as students and they hope to inspire. Many, many people with whom I have conversations have parents who were educators. And so in some ways we have what we call a lot of accidental leaders in education, as opposed to people who joined the field specifically focused on getting there.

But before we talk about getting there, let's just take a look at this 100-school group that we have. And again, we track this just to see where things are going and who, in fact, are the leaders in schools, and what some of the trends have been.

This shows you there has been a lot of churn in the past five years. Nearly half of the heads have turned over, and I think if you look at all the stats from NAIS and others, you'll see a reference to this kind of a churn. In our group, 36 percent of the people in the group have BAs before 1981, and so we expect to see some of that churn continue in the next decade.

Of the heads of school, interestingly, 84 percent of them were external hires and 16 percent internal hires. And this is important to think about, because again, one of the things that we do see more frequently with women than men is a real degree of loyalty and not the moving around from one school to another to get more experiences. And so again, if you think you're going to stay at your same school and get promoted, you may be one of the 16 percent. You may not.

Where are they coming from? Nearly 40 percent of this group of heads were heads in the past, and 84 percent were either heads or the number two. Not surprising that this is where they're coming from. You're either a head or you have been a division head, assistant head, dean, whatever the school has as its title. And then some have come from director of admissions and then "other," which is really colleges and universities, maybe the development side, and maybe just completely outside. But again, you see a real bias toward people who have independent school experience, again not surprisingly.

Current heads are predominantly male and predominantly white. So 72 percent in this group are men, 28 percent women, Caucasian 94 percent, under-represented minorities 6 percent. So this is an interesting data point, because as our search committees -- and some of them do -- say, "We want to have a sitting head be the next head," then we'll show them this information, say, "Okay. This is the pool that you're going to be looking at. And so if you want to start to think about having a more diverse pool, you have got to think a little bit differently about where you're going to be looking."

Search committee dynamics and dreams. So here we are with our search committee. And actually, working with search committees -- Spencer Stuart is a global firm. I have partners who work in retail and finance and asset management and all sorts of things, and they just think we're nuts working with search committees. When we tell them we have got a search committee of 15 or 25 or

whatever that's going to be picking the next leader, they just kind of say, "God bless you, and don't ask me to work on a search with you."

But we love them. They're fabulously committed people, they love the school, they're very excited about this opportunity. Lots of them have kind of negotiated to get onto the search committee, but they quickly realize the enormity of the task. They understand that it's not just about the excitement of it, but really, the message they're getting from their kids and their kids' friends and their social network and the teachers are, "Don't mess this up. Don't mess this up."

It's a high-stakes game for a lot of schools. They're worried about what a bad appointment could mean for their enrollment, for retaining great teachers, for the administrative team they have put on, for the fund-raising campaign that they have aspired to launch. And so they do worry about this. So this is a group that goes back and forth between excitement and worry. And in general, that means they have a desire for us to cover the waterfront, make sure we've turned over every rock. They do have a thirst for a diverse candidate pool and yet, in some ways there's a risk aversity that runs through a lot of these committees, and we need to kind of work with them and work through that with them to understand what do they want and understand what that means for the school.

You have seen the position specifications that my colleagues and I and others in search write after spending a couple of days at the school, and typically it's got some combination of these things: Educational excellence and vision, and that might mean different things at different schools. It usually does. Community builder, executive leadership, somebody who's made some decisions, hired some people, maybe fired some people, run a budget; and resourcefulness. And that can be attracting great talented people and it can be raising money.

That's not all they want. As we say, they really are looking most of the time for God on a good day, and they want all that, but they want to be inspired and they want to be delighted. Again, I don't need to tell you this. These are complicated jobs. I mean, other than when I start a search for a college president, I really wonder who in today's world would want to be -- I mean, what an overwhelming responsibility. You have that, as well. And so really complicated jobs. And there's a lot to be thinking about. I'm going to pop all this up. You know, it's really important. There's a checklist. They want somebody who's been a department chair, division head, et cetera. But there are other things that they're really looking for. Are you interesting? Do you have interesting things to say? What have you thought about in education? You know, are you curious? How can

you demonstrate that to them? Be original. Embrace diversity, inclusivity. This is big. This is what they're looking for. And you also have to demonstrate that you really, really want to be at their school. And we say to search committees all the time that if you get a resume and you check off every box, that they have done everything you need to do to be a head, you may get greatness and you may get mediocrity; right?

And so how do you find those towering strengths, the people who really are truly leaders? And we also tell them you can trade off some amount of operational experience, but you can't trade off judgment and you can't trade off inspiration and just general leadership.

So this is what search committees are thinking about. And so as you as heads of school start to think about how you help develop talent beneath you, how you help people -- and I'm sorry there were no women, but this was the best I could do -- get from here to there, you know, we go back to this whole concept of accidental leadership.

And how do you develop a culture of leadership in your school? How do you do it? How do you get your division heads to do it? How do you get your department chairs to do it? Because it's everyone's job.

Identify high-potential leaders or people. This should be on the agenda of your staff. Who are the people in the school who have come here and they maybe haven't put in ten years at the school. You know, at Dartmouth you were considered new -- I was there seven years; I think some people still thought I was new. But how do you find the people who really are the high-potential folks and tap them and have a conversation with them? Engage them in conversation. What are you looking for? What might you be interested in doing? I see something in you. I don't know if you see it in yourself, but I see something in you.

And again, I'm sure many of you have had those conversations, and many of you, both as the mentor as well as the mentee. I look at someone like Kendra and think, if she hadn't been around, I don't know. She was such a mentor to me and to other people. So engage people in the conversation.

Make opportunities available. Really think. Go back and look. How do you get a leadership position at your institution? How are department chairs selected? How about head coaches? Who gets to be on the strategic planning committee? If you have an ad hoc group with your board, who gets to sit on it? A search committee.

Make those opportunities available to people with talent. And make sure people know how you get there. And if the way you get there is seniority, then maybe you want to take a look at that.

Chart a deliberate course. You know, we talk to heads all the time and I can tell you that there are some heads who sit down with someone they know really wants to be a leader and say, "All right. This is what we need you to do." And they bring the board chair in or the chair of a committee in, they make sure the person has an opportunity to do things like sit on the budget and finance committee meetings that they would typically not be at. What are those specific experiences that a search committee is likely to ask for, and get them on board. So chart a deliberate course that really matches what the person needs.

Provide clear and candid feedback. This is something that so many organizations are not good at. And in my role at Spencer Stuart, working with people who aspire to be leaders, whether it be in independent schools or a dean of a college or a president, we do feedback a lot. And it's really interesting, because first of all, you have to trust your relationship with the person, that they really are ready to hear feedback. And so if you don't have that trust, it's probably a little dangerous for you to offer to give it. But then when you give it, give it clearly with compassion, but with purpose. And also teach people how to accept feedback, which is really to say, "Thank you very much, and I'm going to reflect on that."

When I give someone feedback and they immediately go into, "Oh, no, you're wrong," da, da, da, it stops the conversation. And so teach people how to do that, and invite them to say, "Reflect on that. Maybe I have got it wrong. I don't know you all that well. And come back to me in a few days or a week and we can continue that conversation."

But teach people how to do that. And teach your department chairs how to do that, and teach your athletics director how to do that, and hold them accountable to give people feedback, because none of us grow without it.

And then recommend your talent and encourage networking. And I'll talk a little bit more about that and the kind of language that I think is important in doing that.

And I would say that inertia is probably a huge challenge for most of us, changing the way we do things. We just heard about that. How do you inculcate a culture that encourages people to change, to try something new, to go to a different school, to pack up their family, if they have a family, and do that? And I think also

encouraging people to do that is something that's important. It's hard to take somebody who's really good, and saying, "You know what, I think you should leave." There's one head I spoke with who said eleven people who have worked at her school are now heads of school. She's got to be replacing a lot of people, and that's a lot of heavy work on her part. We like her, because she develops great people. And she's not alone. Many of you people in this room have developed people who are probably sitting with you or whom you'll see at NAIS next week. It's exhausting, but it's really important work and it should be a badge of honor. And when we interview for sitting heads, we always ask them, you know, "Tell me about the people you have mentored."

But let's talk about challenges for women. I'm a Vermonter. I work out of the Boston office, but I actually live in Vermont, and you know, oh, my gosh, it's amazing. The *Washington Post*, *The New York Times*, the articles around women in leadership have been all over the news. You know, from Madeleine Albright's comments to what's going on with Millennials and Hillary Clinton, why do they love Bernie -- there's just too much to read. And I'm not an expert on this, but let me tell you some things that we've seen.

Again, you have got a search committee that may or may not be -- we're going to push them to maybe get outside of their comfort zone. As I have mentioned, leadership experience at more than one school is valued. And again, getting people to move from one school to another in a leadership role is important. Relocation can be hard, sometimes harder for women than for men. And I would say that when we have had somebody pull out of a search at the eleventh hour because of a spousal relo, it's usually because of a male partner who will not move. And I see a lot of heads nodding. And it's often not because he has a career that prohibits it. It's just somehow, they're just not following. Women tend to undersell themselves. And I say this a little cautiously, but there are a lot of men in their mid-30s who think that they are so prepared to be a head. I mean, they just really are. And they will tell you that. They are so prepared to be a head. And there are women with twice the experience who will tell you all the reasons why they are not quite ready yet and what they need to do. And we hear this when I'm having an interview with somebody, and I'll say, "Well, you know, the committee is interested in fundraising. And of course, most people don't fundraise until they sit first chair. But tell me about any experience you might have had in that realm."

The woman will immediately go, "Oh, I have not done any of that. That's a real weakness on my part."

And I'll just stop and I'll say, "You know, let's just frame this a different way. Really, when you talk about fundraising, you're talking about building relationships with people, telling a story, and ultimately making the ask. And so let's talk about the first two things you have done. Because you may not have made the ask yet, but talk about the way you talk with families. Do you do an admissions open house? Have you addressed the board? Do you do alumni presentations?"

"Oh, yeah, I do all that."

"Okay. Well, you know, you're out there telling the story and building relationships. And then you just have to make sure you can look someone in the eye and ask them for more money than you'll probably ever have in your bank account without passing out. And do you think you can do that?"

And most people can do that. But that's the other thing, this idea about having the confidence in yourself that you're a learner, and you really break down some of these things and figure out ways to communicate what you have done that's similar to what you would be asked to do.

I want to talk a little of gender bias and I'm going to take a risk right now. Let's see if I can do this, get this video up that I thought was really interesting. There we go. Let's see.

(Videotape of Pantene commercial.)

MS. GORMAN: That's a Pantene commercial. It's one of those things that you kind of laugh when you first watch it, and then you go, "Wow, it really is powerful." And I can tell you that it is alive and well in search committees, and we really now at Spencer Stuart are very explicit about this when we start a search with people and we start introducing them to candidates. How does it play out? It plays out in language of how people see candidates. And I'll talk a little bit later about how candidates are referred to us, and what we hear when we do referencing. Ambitious versus aggressive. Is someone collaborative or indecisive? And I have seen this. When a man is in a search committee and starts talking about his kids, "Oh, no, I have got a great seven-year-old and a three-year-old." The search committee kind of melts, and isn't that sweet. And when a woman talks about it, they can raise questions like, Oh, my goodness, is she going to be committed? Who is going to take care of the kids? You know, really, is this going to work?

Interestingly, a surprising number of search committees will say, when we're talking about what characteristics are really important for the search for the next head, they'll want to know that the person has children. And I don't have children. And I say, "Well, that's interesting. So is a characteristic that's important that you are a parent? So you think that parents in particular are skilled to lead schools?"

And they go, "Oh, no, no. Most parents can't lead schools."

"Okay, yeah, I'll go with you there."

But again what are they talking about here, and how do you break that down? Because that really does disadvantage people who are single or child-free. And I think that there's a challenge for single people and perhaps particularly for unmarried men.

So we have to bring these issues up, and we have to show them examples of people who really are tremendous heads of school from a whole range of diverse backgrounds, and we do that. One of the things we do with a search committee at the very beginning, usually the first time we meet, is we bring a calibration exercise. And this is meant to just be a little bit of a Rorschach test of, you know, where do you want to look? What's important to you as you look at profiles? And we'll show different profiles. It will be very clear somebody might be a rising star, someone might have worked at schools that they haven't heard of, someone might be from a university, someone might have a Ph.D., might not have a Ph.D. There are all sorts of things we might test in this exercise, but we also are testing for gender, we're testing for racial diversity, we're testing for, you know, will you appoint a gay person to lead your school? And that's a question that we ask search committees, and it's interesting because I think this is an area where the whole country has moved quite a bit lately, a huge amount lately, but in some of our schools that's still an issue.

I remember one search committee where I sat down with them and we were talking about all these things and we're looking at a profile, and I said, "What if I told you this person is gay? Would that person be a candidate for you?"

And everybody immediately started talking about how they have gay friends. And I said, "No, no, no." And I went back to the search committee chair and I said, "You need to look me in the eye and tell me that you will appoint, you will stand

up in front of your community and introduce someone who will come with their same-sex partner. Otherwise we're not going to engage anyone with that background."

And you owe this to yourself as potential candidates to look people in the eye and ask them, Is this school really ready for a woman? You know, would they hire a Latina to run this school? Because if not, you have better things to do with your time than to be engaging in a search and you do not don't want to be cannon fodder. Every search committee wants a diverse slate but you need to find out, are they ready for a diverse candidate? And hold people like me accountable to give you that information.

You are all, as sitting heads, also going to be referring people and your language is really important. Research has shown that people use different language to describe women than men. I don't have to ask you to guess which column is for women and which is for men. But I would suggest that you keep a list like this handy when you go to do a reference. And if you are looking for a job or you are in a search and you have referees, I would encourage you to give your referee a document that says, "Here are the things that are important in this search, and here are some examples of things I have done, and here's some language that you might want to think about using." And I would say that really what you want to do is emphasize accomplishment over effort, and think about these powerful words. The words caring, compassionate, hardworking are all important. Those are really important and there's no doubt that you want to have people talk about you in that way. But people, when they are looking for a CEO, are looking for success, for accomplishment, for people who are outstanding, for skills and knowledge, et cetera. So think about the language that you use.

I joke with my colleague Michele Haertel because sometimes we'll hear, "Well, she's a little bit aggressive," and we'll say, "Unpack that a little bit. Give me an example. Give me this great example of somebody who really set a course, led a great process, brought people along -- maybe not everybody -- and made a decision." And you're thinking, you know, that's kind of what you're looking for in the search. So make sure that you understand. And that's our job, too, is to understand. Because when you do 360 referencing and you're talking to people who are bosses, colleagues, and people who report to this person, again, we need to have those filters, you know, as the people who are reporting back to the search committee, and we actually have the search committee do a lot of their own referencing towards the end game, but to really try to get examples of what are you talking about when you use these words.

We talked about developing talent and what are some of the challenges for women to our little search committee, which is still gathering. So either you're thinking about getting engaged in a search or you have got a protege who's engaged in a search and trying to figure out whether to do it. Again, spend a lot of time up front. Don't jump at every opportunity. Find out what are the values of the school, what does it hope to accomplish. If you look out one year or five years, how will the school be different if they get a great head? Understand that. And then ask, am I a realistic candidate? You might want to ask. There are often internal candidates. Ask, is there an heir apparent? Is there really somebody that they know, unless something crazy happens, that person is going to be the head? You know, ask, you know, all the questions we asked about gender, about difference. Are they ready to do that? And if they are, then be ready to go and engage.

And as you get into an interview -- and I'm going to think about this sort of in particular for women -- the goal of the first-round interview really, quite frankly, is to get to the second round and to learn as much as you need to learn to find out that this is the right opportunity for you, and to convey to them what you have done.

When we do first-round interviews -- and Lori said this in the last conversation -- the best indication of what someone can accomplish in the future is what they have accomplished in the past. So think about your stories. So here's the top ten list. Be prepared. And I would say, again, when you think about gender issues, women are always prepared. They really always are. But do your homework. Know the format. Make sure that you have a conversation with a search person before you go in. Know the players. Know the institution. Have read up on it.

Convey confidence. And this is countercultural for many people to speak about their accomplishments. But do it. And do it with confidence and with some amount of humility. Think about using "we" versus "I." If you talk about, "We, we, we, we, we," at the end people are, What did she do? Right? If you go, "I, I, I, I, I," they're, like, does she know that there's someone else, that this is an important collaborative effort?

Again, discuss accomplishments. And think ahead of time about the stories you want to tell that will demonstrate to the search committee what you have done, how you have done it, how you have brought people along, all the things that are important. People remember stories -- you all know this -- more than they remember declarative statements.

Demonstrate collaboration and decisiveness. Give examples that you're a team player and that you can make a decision. Maybe if you're at a Quaker school you have got to -- but even at Quaker schools, you need to make decisions.

Be honest, but don't undersell. This is not a time to be modest. This is not a time to be modest. Listen well. Answer the question that is asked. You are not at a White House interview answering the question you want to answer. There's nothing that makes a search committee more enraged than people who don't answer the question.

Demonstrate curiosity. Demonstrate gravitas in your questions and in your answers. You will always have time at the end of an interview -- you should -- to ask your own questions. And when you do that, remember you have got a brain trust of this institution in front of you, and they want to hear good, strategic questions. Don't ask what the next step is, ever. Ask me that. But you know, use that to learn more about the institution.

Be fun and engaging. Talk about the kids. Talk about the faculty. Be yourself. Because at the end of the day, you have got to make a decision here.

A few other things. Dress like you mean business. They're going to be looking at you, going, All right. Is this the head I want to see at the head of the table during my board meetings? So, you know, step it up and look great.

And remember, it's a two-way street. You should always be thinking about whether this is the right fit for you through the first-round interviews and as you approach the second-round interviews. Ask for specific feedback from people like me. What did they not understand? What questions do they have? When I go back, what are the things I need to make sure that I convey to them? And make sure that I know what questions you have, so I can get the information to convey back to them. And in the second round you'll probably have different opportunities to meet. You'll have breakfast, you'll have lunches, you'll have small group meetings, large group meetings, and you'll have a chance to experience them. And we tell our search committees, This is a two-way street. You are assessing but you are recruiting, and so make sure you get what you need. And if you decide it's not the right thing, get out as soon as you can. It's not good for the school, it's not good for your fellow people in the search, and it's certainly not good for me, if you stay in to the 11th hour and then pull out. You'll learn more, and if it's not right, that's fine; just get out. I think sometimes people delay that decision. They don't want to hurt someone's feelings, and they're not sure, but do that. Spencer Stuart

has done about 40 searches in the last ten years, so we don't do a ton of these. We love them and we are doing more of them, but all but two of our placements are still seated in their jobs. One person who left was an internal placement who stepped out, and then another was not. And so 38 people in ten years who are still sitting in their seats -- we're really proud of that, and I think it's because we really are deliberate in spending time and getting our schools to spend time with people.

I will say also -- and maybe we can talk about this in the Q and A -- that people need to be careful about a very public process with multiple candidates at the end. I know many schools say that it's really important for the culture of their school to have that. But being in a public process in the age of Google where someone can see, Oh, my goodness, here's a candidate. I see that they were at three or five other schools in the last year. Do they really want our school? You know, that's something to be aware of and careful about.

And I think the other thing that's going to be very important as you think about schools is the board you're going to be working with. Interestingly, never short-shrift the amount of time that you can spend with the board chair. And know who the next board chair is going to be and how that person is going to be picked. *Harvard Business Review* did a brief article in September, and this is sort of a summary of it. It's called "The Sorry State of Nonprofit Boards." And it was based on a survey and, again, directors lacking critical skills, boards lacking formal processes, fundraising overemphasized, upheaval is common. You do not want to be at a board with these characteristics. If you have a board that's had a troubled past, ask them what they have done. What is the plan? Do they have a consultant? How are they addressing these issues? Because a CEO with a bad board is not a good bet for you. So be very careful about that.

And how do you do that? Ask them. Find out, where can the board play? And really, there are very few places that a board ought to be playing. Strategic direction of the school, working in partnerships with you and your team, leadership succession subsection, financial oversight, and governance. That's it. Not picking your new athletics director, not getting involved in a discipline case, not intervening on a faculty matter. So ask the questions you need to ask. We're doing more follow-on conversations with boards around board and head relationships, because it's really important to us that when we place somebody in a role, the board and the leader have a good relationship, and so our leadership advisory team and I are partnering on a lot of that.

Finally, get to know search consultants. We're head-hunters, sure. That's sort of a funny term, but we really are consultants, and I think that's important to think about. We're meeting up with schools at a very critical time in their institution's path, at this inflection point where they're changing leaders and thinking very clearly -- or trying to think clearly -- about where they're going and what it's going to take to get them there. We're never confused about who our client is. We are never confused. We work for the schools, and we work for the boards, and we work for the search committees. But we can't do our work without the relationship that we have with heads. We treasure that, we honor and respect the work you do and our relationship with you, and we want to get to know people. We do this full-time. We want to get to know people. So share your talent, share your knowledge, your observations. Return our calls, if you can, or send us an e-mail. If we are annoying, if we're calling you too much, tell us. Tell us. We like clear feedback.

Call us with questions. Ask our advice. I think there are people in this room that I talk with regularly and I'm happy to think about what their career might look like, whether it continues in education or something different. I would say my colleagues in the education nonprofit practice and colleagues I have met at all the search firms that I get to know through the business care deeply about schools. We do this work because we care about schools and we care about where they're going and we care about what's happening in education in this country. And so it's a real partnership with you, with your search committees, and with your boards to get the next crop of great educators, and hopefully an increasingly diverse group of people who will be leading schools and thinking about education in the country. So I'll pause now and answer questions that people might have. Thank you very much.

MS. BROWNLEY: We have time for about ten or fifteen minutes of questions. Any questions?

MS. HUNTER: Thank you. Cathy Hunter, yet again. I'm curious. I'm in my last few months at my school, so I'm interested in this topic. Why does the process have to be so long?

MS. GORMAN: That is a great question. And, in fact, it doesn't have to be that long. It typically takes a long time more because of scheduling than anything else. We did a search this fall in New York City for the Ethical Culture Fieldston School. I think it took about three months from start to finish. And so it really is around scheduling search committees; we need to make sure that we spend time at the beginning getting to know your school really, really, really well. And then we get out into the market and talk with people and start to develop the pool.

I would say a lot of times when we're doing a search -- and we don't know everybody; that's for sure. There are plenty more people we need to get to know. But we get a fairly good sense fairly quickly of who we might want to have introduced to this group. And our research has shown that we identify the successful candidate in the first seven weeks of the search.

So it's really about process, and it's about getting search committees comfortable with the fact that we can do this more quickly. We did the search for the president of Brown University I think in the same time frame, about three months. So we can move more quickly, and I think that you'll see schools starting to do that because we are starting to tell them we can do it more quickly, and if they can get their schedules aligned, we're ready to roll.

SPEAKER FROM THE FLOOR: I'm going to demonstrate that I can ask a question quickly. Quaker schools can't make decisions quickly.

I'm concerned about who we identify as candidates, and I'm concerned about who the actual search consultants are. We hire people who look like us, and I just don't know what the makeup of the search consultants look like. Are they diverse? So can you speak to those biases, and do they exist, and what is the complexion of search consultants across all firms?

MS. GORMAN: I cannot speak to what the complexion is across all firms, I'm afraid. I can tell you at Spencer Stuart what the complexion is of search consultants. There are Christine Johnson in California, Chuck Jordan in Atlanta, Michele Haertel in Stamford, Connecticut, and myself who do the lion's share of the searches in our firm in education. Jennifer Bol does some, as well, but fewer now.

So of those four people, there are two Caucasian women, one African-American woman, and one white man. So not as diverse as we would like to be, but that's something that I think as a firm we continue to look at. We have a diversity practice within the firm, and again, I don't want this to be a Spencer Stuart ad, but anyway, we do have a diversity practice within the firm, and that is a specific practice, and their job is to continue in all industries to identify talent from people from diverse backgrounds. But I think your point is well taken. We need to always be pushing that, and I think our firm does. I assume other firms do, but I don't know, in the same way schools do.

MS. SPEERS: Can you speak to what you have seen as best practices in terms of best practices for schools in leadership transitions once the head has been named?

MS. GORMAN: It's interesting. More and more there's a long period of time between when the person is named and when they take over. Does that resonate with folks in this room? Yeah. And so because it's so elongated, there are some opportunities there and there are potentially some pitfalls.

First of all, I think a best practice is, get some part of the search committee to be part of the transition committee, because you need to have a very formal group of people on campus who are absolutely committed to making sure that you have the right introduction, that you're getting the right feedback, you have the right set of experiences. And so that's one step.

The second is a really close relationship with the board, and the board chair in particular, so those should be fairly regular conversations.

I think the third is a real sensitivity to the fact that you are not yet the head and that there still is a head. So I think the communication between the sitting head and the head-elect is going to be very important. And if that can be direct, I think it's better, but I think somebody on the transition team has to be talking to both of them. I think best practice would say the head-elect should not be at all the board meetings. Maybe for part of one, but in general, not at the board meetings during that year. Let that head finish the year, finish the year gracefully.

I think if there are any important hiring decisions that have to be made in terms of the leadership team, best practice is, that's the job of the head-elect. That's going to be your team, to make sure that happens. I think more and more we're seeing our head-elects having designated mentors from outside of the school or coaches from outside of the school, as well as a connection inside. Somebody who is an adviser, to whom they can go without any political ramifications and say, "Help me understand what just happened," or, "Do you have any perspective on this?"

So I think it's really building that team inside and outside and, as always, it's about communication. Does that resonate? Are there other things that some of you have done during transitions lately that you think really work well?

SPEAKER FROM THE FLOOR: I'm curious about the head-elect making the hire, because I have heard exactly the opposite, that the person who's there knows the culture of the school best, and so for the head-elect to make a key

administrative hire which for some reason might not work could be a fatal -- not fatal, but a difficult situation.

MS. GORMAN: Let me try to clarify. If there's a senior leadership position that's open, the director of the upper school, the athletics director, director of the lower school, college counseling, et cetera, in that position, so let's imagine that you're the head-elect starting in July 1, 2017, and that position is going to start when you start or soon thereafter. What we've seen a number of schools do is start the search process now, but make sure that that incoming head is part of the decision, is part of the decision. Because they're going to work for you, not for the past person. And quite frankly, if you're not involved in the decision, I can't imagine people wanting to take that job. Getting hired by the person who's leaving? Does that make sense?

SPEAKER FROM THE FLOOR: That makes sense.

SPEAKER FROM THE FLOOR: Thank you, Mary. A statement and a question. The statement is, Sissy can buy me a drink later. But when I became a division head, my head invited me as the associate member to this conference, and I think to state the obvious, one of the best things we as sitting heads can do is bring someone that's an aspiring head from our schools every year to this conference. It was done for me, and I'm forever indebted. So just a reminder to all of us.

My question, Mary, is: Spencer Stuart seems to have originated the philosophy of the so-called confidential search. Maybe that's true or not true. Do you do open searches and could you just elaborate on the philosophy of the confidential search and why you started doing it? Because it wasn't the way most of us were hired. It's sort of a new model some of us struggle to understand fully. Could you just talk about that a little bit?

MS. GORMAN: Sure. I'd be happy to talk about it. We talk about closed versus open searches. And I do think that that's not accurate. There's really no search that's fully closed or none that are fully open. But I think your point is that traditionally at schools there was a day when three or four candidates would come and would meet with everyone in the community. I remember that when I was at Exeter, Ty Tingley came and we all could go and hear him, and everybody could opine on what was needed at the school. I don't know if Spencer Stuart originated that. I have been at the firm now six years, but I think certainly when we work with search committees, what we encourage them to do is run a candidate-centric process, a process that gets the best candidates as options for the school. Usually

when we go on campus for on-campus meetings, we get that question. "When will I get to meet the candidates?"

And our response to them is: "We don't know. We don't know if you will be able to get to meet them or when you will be able to get to meet them. Because quite frankly, some of the best candidates will not do a process where they are exposed. And I think that it's driven. I don't know that it's driven by Spencer Stuart so much as it's driven by the world.

Twenty years ago, three people could show up at a school and that would have been fine, and maybe their board chair knew. If that happens today, chances are that something is online, there's a resume, there's a photograph, it gets put up there. If you're a sitting head and thinking about a second headship, and you're running a campaign at your home school and the next thing you know, there's a picture of you online telling School Y that this is your dream job, not so good for you. Right?

So we say that we run a candidate-centric process. There have been searches we've done, so I'll give you a couple of examples. We did the Andover search, and both finalists spent a day on campus at Andover. There have been a number of other searches we've done. We did the search at Groton. And at Groton, candidates met with a confidential panel offsite, a faculty, staff, and administrators, and they met with the full board. So was that open or closed? Sort of in the middle. But if we hadn't done that, and there were sitting heads in the pool, they would have said, "Sorry. I'm out. I'm out."

So open and closed -- I think it's really about: What are your best candidates willing to do? And at the end of the day, as a school, if it's absolutely essential that people come to the campus and meet people, fine. But just understand, you're going to lose some candidates.

I would also say, as you're advising people, doing that multiple times, it's not great. We'll have people say, "Well, gee, I went online and saw that candidate, that person you're presenting to us, was in three other searches and they were a finalist and they didn't get it."

And we'll say, "Well, maybe it wasn't the right fit for that particular school. And by the way, all these other people might have been in a lot of searches and didn't even make the finalist pool, but you don't know."

So I think in this age of digitization, you have got to manage your perspective.

MR. BURKE: My name is Paul Burke, at Nightingale-Bamford in New York City, and I served on a search that Spencer Stuart led this year for Browning School, a really successful search, and the argument that you put forth was the one that actually won the day for the search committee, saying that this would get you the best pool of candidates.

One of my observations, by sort of being the only educator on the committee, though, was how empowered this small group was. And candidly, people who spend their lives doing things other than education, how little they really know about the day-to-day operations of running a school.

So I wonder, when you think about the creation of search committees, how much you think about orienting them or giving them a sense of the challenges and opportunities that come with this job. Because I think my sense is we're going to see more and more of these closed searches for all the reasons you well articulated. But as a result, I think we've got to change some of our other practices around orientation and training of trustees who are involved in this decision-making.

MS. GORMAN: Thank you for that. I think that that's absolutely right. We don't pick, we don't create the search committees. We are handed the search committees and we have to work with them, although I would say more and more we do get brought on early in a number of searches or even before a search firm is selected; we are available to advise people if they call us about composition of the search committee. We have had a couple of clients do board-only searches, board-only search committees, and we strongly advise schools to bring on members of the faculty and potentially of the administration for exactly the reason that you bring up.

And we also right now spend at least two days at every school meeting with people, broadly speaking, parents and students and teachers and administrators, and then feeding that back to the search committees. More and more we've decided that a best practice is getting the search committee to be there with you, to listen to a lot of those conversations, and listen to what's on the minds of the community, to hear it firsthand.

There's a little bit of a balance there of doing it, having search committees doing it, because you do want to create an environment where people can be completely frank with you and say, you know, this is a problem at the school that needs to be fixed. So will they say that if the board member's in the room? So it's a balancing

act. But we've got to try to create that environment. But thank you. I agree with you completely.

MS. BROWNLEY: We have time for one more question. Who wants to be last? Well, thank you so much.

MS. GORMAN: Thank you.

MS. WADE: This is an important aspect of our leadership as heads of schools. Thank you, Mary, for your insights, your clarity, and your candor with us this morning. Thank you very much.