

## Filling Big Shoes: Engaging in a High-Profile Search for a New Executive Director



*Growing up in Mount Washington Valley, NH, Laurie Gabriel had long been well acquainted with the trails and programs of the Appalachian Mountain Club (AMC), but the organization’s value came clearly into focus while she was a teenager. While leading a group of children on a summer hike in the White Mountains, she watched as an AMC hut crew set out to rescue another group of hikers stranded during a hail storm. The idea that it could have been her small group needing rescue stuck with her, and from then forward, she became a supporter of the organization.*

*Her first formal association came as a member of the organization’s President’s Society; she then joined the board of advisors, its investment committee, and finally its board of directors. In January 2008, Laurie became chair of the board of directors, and as such, she led the organization’s effort to find the AMC’s first new president in 23 years to replace Andy Falender, who was retiring. John Judge, the AMC’s new president started in January 2012. Here Laurie shares how the organization embarked on such an important transition to successfully fill the “big shoes” of a beloved leader.*

### **Bridgestar: When did the search for a new AMC president begin?**

**Laurie Gabriel:** The process really started with discussions about Vision 2020. AMC has had a program of developing a 10-year strategic plan each decade. We had Vision 2000, 2010, and in 2008 started 2020.

### **Four Lessons for Conducting a Successful Search**

Laurie Gabriel headed the search for the Appalachian Mountain Club’s new president, John Judge, who replaced the organization’s leader of 23 years, Andy Falender, after his retirement in 2012. In this sidebar she shares her top four lessons on conducting a successful executive director search. [Read more >>](#)

Andy and I were aware that his retirement was coming up and recognized that our strategic planning process would be an important foundation for helping us think about what kind of characteristics we needed to carry out that vision. When Andy announced to the board of directors in 2009 that he’d be retiring in early 2012, we created a transition committee [a subcommittee of the board] that began

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meeting in the spring of 2010 and started thinking more directly about the needs of the organization and characteristics and priorities for the next president. The committee created a rough timeline for Andy's transition and also outlined specific roles for the board of directors, the search committee, and the senior staff in the search process. For example, the board delegated to the search committee the selection of the final candidate, subject to a board vote on the individual. The board approved this document in mid-2010. The clarity this provided about roles and responsibilities was important at various points during the process.

**What particular concerns or worries did you have going into the process?**

**Gabriel:** One that was both an opportunity and a challenge was that Andy had been with organization for 23 years; he had been a very successful and beloved leader, and there were some built-in expectations that were going to be a challenge for any new person stepping into the role. In short, his were huge shoes to fill.

Also, given the breadth of our mission—recreation, education, and conservation of wilderness areas and natural places in the northeastern US—finding a person who understood the importance of all three parts of the mission and had interest and some experience in all three, was clearly a challenge. And then, unlike many nonprofits, we also knew we needed someone with business skills to manage a fairly complex operation with lodging, publishing, sustainable forestry, and more activities that support our mission.

**The AMC has many stakeholders (multiple chapters, organization members, co-existing programs/business areas), how did you go about informing them of Andy's retirement?**

**Gabriel:** We recognized that frequent, effective, and inclusive communications would be a key part of hiring the right person—and someone the organization would accept. In the middle of April 2011 we began to inform staff in Boston and Pinkham Notch [NH] as well as the chapter chairs of our 12 chapters via conference calls. We followed that immediately with letters to about 650 key donors and advisors, letting them know about the upcoming transition. In May 2011 we had meetings in Boston and New York City with over 100 members of our board of advisors and also with our chapter chairs to begin soliciting their thoughts and input. We then announced Andy's retirement to all of our members, approximately 100,000 of them, in the July/August 2011 issue of our magazine.

This is when we started the public phase of our search and began talking to contacts and using networks to identify candidates. So, we spent the first couple of months of 2011 planning, then we used the spring

to inform the insiders at the AMC about the transition, and finally we made the broad announcement and officially began the search, which took six months to complete.

**As the search chair, whom did you involve in the search process?**

**Gabriel:** We asked the board members who had been part of the transition committee to continue as members of the search committee and added a couple more board members to broaden the representation of various parts of the AMC. We also added three non-board members to the search committee, all of whom were familiar with the AMC but not in great depth. All had extensive experience with nonprofits and with nonprofit searches and leadership and had experienced both successes and challenges in previous searches. In total there were 10 members of the search committee, a large group, but in our case, necessary to have all the different constituencies of the AMC represented. At the end of 2010 we conducted a search for a search consultant. We solicited and received RFP [request for proposal] responses from eight firms, interviewed four, and hired Bridgespan.

**How did having non-board members help the process?**

**Gabriel:** At first I was ambivalent about adding non-board members—I wasn't sure they'd understand the culture and the organization, but it became one of the best decisions we made during the search. Bringing in that greater depth of experience was one reason, but the outside members also brought fresh, new perspectives, and good questions and challenges to some of our assumptions about the AMC.

**What steps did you take to engage the AMC's diverse stakeholders in the search process?**

**Gabriel:** Throughout the process we wanted input, ideas, and recommendations. Bridgespan opened an email box where people could submit names or thoughts anonymously, which was used by staff, donors, and advisors. Andy and I met in person with each of those groups a couple of times to ensure they felt up to date on progress and to remind them they could still offer input. We also added a section to our monthly executive newsletter, which goes to about 650 supporters and volunteer leaders, about the search activity. Our goal was to make everyone feel that they were well informed and that there would be no surprises.

**How did you engage senior staff in the process?**

**Gabriel:** We have a very strong and experienced leadership team (LT), and although none of them were interested in taking on the CEO role, they had serious concerns about who the search committee might choose. We also made the decision not to include a member of the LT on the search committee, which I believe was the right choice, but which further heightened the team's anxiety. So we knew we needed to spend a lot of time on two-way communications here.

I met individually with each LT member [seven people] early in the process, and Bridgespan also interviewed the LT before the search began. They were involved in developing the job description. They also attended board meetings when we talked about what was going on with the search. Once the search was underway, our search consultant and I joined a bi-weekly conference call with the LT to provide updates and invite their questions and thoughts. We worked very hard to make certain the senior staff felt involved and felt that they had influence and input without being on the search committee. Near the end of the search, they interviewed four people that the search committee considered “qualified candidates.” Their feedback was important in helping us get to our final selection of John Judge. They provided individual feedback in writing, and we invited each of them in to meet with the search committee to add any verbal comments.

Early in the search process, we also created a “buddy system,” where we asked individual board members to buddy up with a senior staff person and check in periodically so that any concerns that the senior staff had could be discussed one on one with their buddies. For example, our Treasurer (a board position) buddied up with the CFO (staff). The buddy system was used a few times and definitely helped create a greater comfort with the process overall and with the eventual outcome.

### **How did the various inputs influence the search process along the way?**

**Gabriel:** There are many examples. One thing that became much clearer during the course of the process based on input from various areas of the organization is that there are a lot of ways to appreciate the out-of-doors. From this we came to realize that the new president had to have what we called “outdoors credibility.” One early candidate, for example, loved to garden and paint outdoors, but that’s not what the AMC is about. We looked for someone who wanted to hike, paddle, and/or bike, and who had the interest and capability of doing that—and enjoying it—even if it was raining or snowing. We even took our finalist on a couple of hikes to make sure he was someone we’d enjoy spending time with on the trail. That also helped us share with him the real purpose and mission of the organization.

### **What were some of the challenges you faced during the process?**

**Gabriel:** The challenge for us throughout this process was that the AMC is so broad and so diverse, and the mission is complex—its businesses and activities are many-fold. We heard a lot of thoughts, not so much surprises as shifts in emphasis on the things we considered. One of the key things we heard was that the new president really had to fit the strong culture of the organization. People define culture in different ways; common themes for the AMC’s culture were professional, informal, collaborative, open communication style, open to new thinking, appreciative of individual initiative. These things became a priority in terms of thinking about our next president.

## How did the committee balance the need for “hard skills” with finding someone who would fit the strong culture of the AMC?

**Gabriel:** We decided we needed someone who had both. It became a little bit of a threshold criterion. We felt we needed someone with experience with P&Ls, operating budgets, ultimate decision making with respect to business operations of an organization. That was a threshold. We also needed someone who clearly demonstrated passion for the AMC’s mission and would be a good cultural fit for the organization. These were two places we couldn’t compromise. We saw people who had tons of one and not enough of the other. Interestingly, it was a long email from one of the LT members that crystallized for us that we couldn’t compromise on either business skills or cultural fit.

## Four Lessons for Conducting a Successful Executive Director Search

Here Laurie Gabriel shares her top four lessons for conducting a successful search:

1. **Have clarity about your long-term strategy and priorities before you begin your search.** It helps crystallize what you need in a new leader. The work [the AMC] did on Vision 2020 was very important in helping us lay the groundwork for the type of person we needed for our next leader.
2. **Spend time on communications throughout the organization.** Solicit input and continuously communicate back with the organization. It helps create comfort with process and with the final selection. You learn a lot more than just what you need in a new president—you learn what’s going well, not going well, and what people are thinking about the organization through the process. It’s also a chance to re-affirm your “story” and your activities with supporters.
3. **The interpersonal dynamics of the search committee are critical to reaching a good outcome.** We had people with very different backgrounds and perspectives on the committee, but they also meshed very well as a group. Think about the interpersonal dynamics of committee members as well as their skills, background, and the representation that they bring. We spent literally hundreds of hours together and on the phone. If you don’t have a positive group dynamic, it could be a long, long process. And you’re also less likely to get to the best outcome.
4. **The search process for nonprofits is much different than it is in corporate world.** I personally had not been involved in a search for a nonprofit previously, but I had hired dozens of people in the corporate world. In business I was either an advisor for

somebody else who would make the ultimate decision or I was the decider: I solicited input but the decision was mine to make. In the nonprofit world, when you create a search committee, you're a leader or participant in a group decision-making process. Soliciting individual input, bringing people along, allaying concerns, building consensus without settling for a compromise, those were all a big part of my role as search chair at the end of our process.

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