Finding the next president is a critical point in the history of a Jesuit school. We can learn from our shared experience how to do it well.

Presidential Transitions
Experience and Best Practices

Jack Peterson
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Introduction

Most boards of Jesuit schools which have gone through the process of selecting and on-boarding a new president will agree that it is the most significant task they have undertaken. Those serving on Jesuit school boards recognize well that their school implements a privileged mission. They don’t want to lose that by selecting a president whose leadership, or lack of it, pulls it off its Jesuit foundations.

Most who have been involved with a presidential search will also say that it is the most difficult and time-consuming task they’ve undertaken for the school. And it’s no wonder, given the impact the president will have on the operation of the school and its ability to achieve its mission. Every employee in the school is important, but the president has the greatest span of authority and responsibility. There is above the president no other employee, only volunteers serving on the school’s governing board and the Provincial and his assistants, for whom the school is but one of many responsibilities.

The president has three broad responsibilities: Mission, presence and resources. While the board defines the school’s mission, within the broader Jesuit mission, it is the president who is charged with articulating it, operationalizing it, and challenging the school community to embrace Ignatian spirituality in all that it does. Presence is important because the president puts a human face on the institution to both internal and external constituencies. Being at school events, funerals, Rotary meetings, professional associations and fundraising activities puts a tremendous load on the president, but such personal contact is indispensable to the school’s living out of its Jesuit charism. Finally, as the school’s chief administrative officer, the president is in a unique position to garner the resources that the school’s other professionals need to carry out their work—dedicating substantial time and energy to fundraising, supporting the recruitment of students and marketing the school to the various groups whose support is vital to its success.

Given the impact and span of the president’s responsibilities, search committees can feel that they are looking for a superhero, and they soon realize that given the specialized character of the Jesuit school, the pool of candidates seems thin for producing such a rare convergence of skills and qualities. The best strategy is to be clear what kind of president the school needs, cast the net broadly, discern the candidates carefully, and be ready not only to appoint one who has as many of the desired qualities as possible but to have a plan for helping him or her grow in those that are lacking, or need further development.

Search committees learn early on, or wish they had, that hiring the president of a Jesuit school is different in important ways from other types of hiring they’ve been involved with. As most search consultants will tell you, there are even important differences from hiring for other private schools. This handbook, Presidential Transitions: Experience and Best Practices, is intended to give search committees effective tools for the unique task that has been entrusted to them.
This handbook is intended primarily as a guide for those who find themselves responsible for the success of the presidential transition process, or some part of it. These include board chairs and members, search committee chairs and members, Provincial Assistants for Secondary (and Pre-secondary) Education and even consultants engaged to conduct a search for a Jesuit school president. Board and search chairs faced with replacing a president are encouraged to read this handbook in its entirety. Others may want to read only sections pertinent to their role, and it is made available in such a way that search committee chairs can provide portions of it to their committees as the need arises—a sort of just-in-time approach.

Here’s how the handbook works. It actually consists of two volumes. The first, this one, gives an overview of presidential transitions, including both the recent experience of Jesuit schools, and recommendations for best practices. It begins with a section called Study Findings: Trends in Jesuit school transitions, which describes the research study and shares the results on which the recommendations are based. This is followed by a section called The role of a president in a Jesuit school, which sets out the responsibilities of a Jesuit school president, how the president relates to other key players in the school community and the expectations of the president. This is followed by a section called Finding the next president of a Jesuit school, which describes the overall process and best practices specific to Jesuit school president searches. The last major section, The next step: supporting the new president, is based on the assumption that no president will start out fully formed. So it suggests ways the search committee and board can set a trajectory of continued growth for the new leader. Throughout the handbook there will be references to sample documents and tools which can be found in the second volume, consisting of 26 appendices. These are intended as resources which JSEA member schools can copy and adapt for their own circumstances.

Both volumes are available as downloadable PDFs on the JSEA website (www.jsea.org, under the Resources tab), and can be used digitally or printed in hard copy. They are also available for purchase in bound format by ordering from Lulu Press at www.lulu.com or directly, for the Handbook, at http://www.lulu.com/shop/jack-peterson/jsea-presidential-transitions-experience-and-best-practices/paperback/product-21766431.html, and for the Appendices, at (http://www.lulu.com/content/paperback-book/jsea-presidential-transition---appendices/15119008).

The materials are copyrighted by JSEA, but all JSEA member schools have permission to use them and reproduce them for their own searches as needed. Other persons and organizations should contact the JSEA at jsea@jsea.org to inquire about availability.

We want to thank the over 40 people—search chairs, board chairs, PASEs, JSEA staff, search consultants and others—who contributed to this project in some way. They are listed in the acknowledgements at the end of this volume.

Finally, we wish you all the best and offer our prayers for the important work you have undertaken. We welcome any feedback on how these tools can be of greater help. Please send your comments and questions to jsea@jsea.org or contact the study and handbook author at jackpeterson@managingformission.com.
As the 2013-14 school year began, it was becoming clear that a sea change was occurring in Jesuit schools. In many ways the Jesuit “brand,” if you will, was as strong as or stronger than ever. The schools generally had excellent academic reputations, committed and engaged faculties, loyal alumni, parents and benefactors, and they had developed powerful methods of student spiritual formation that were the envy of other faith-based schools. Further, the work of the Provincials of North America, the individual provinces, the Jesuit Secondary Education Association (JSEA) and the schools themselves had created a high level of awareness of and collaboration around the unique mission of Jesuit secondary education. As a result, in many ways, these schools are now as healthy as they have ever been.

The temptation to triumphalism, however, is tempered by several factors, not the least of which is the awareness coming from Jesuit spirituality that our attachment to the consolation of the current moment can lead to desolation. But there is also concern that one key element, the future leadership of the schools, may be a vulnerability. In response, the JSEA has made the strengthening of the leadership pool a crucial priority during the second decade of the century. In addition to the conferences the JSEA runs for trustees, presidents, principals and other administrators and its Colloquia and Symposia, JSEA also offers the impactful Ignatian Leadership Seminars, and has recently added a Leadership Discernment program for potential Jesuit school presidents.

As the tiles of the leadership mosaic have been filling in, it has become clear that the process of selecting a new president is a crucial juncture in the development and continuity of a Jesuit school. From 2009 to 2014, there have been 40 presidential transitions in JSEA schools. That’s an average of eight per year, or 13% of the JSEA member schools bringing on a new president each year. For each of those transitions, there is a moment of concern about whether an effective leader can be found to keep the school on the trajectory of its unique Jesuit mission. It was in this context that Fr. James Stoeger SJ, president of the JSEA, proposed that a study be conducted of the presidential transition processes experienced by the schools. “There is a need,” Stoeger concluded, “to provide resources to assist schools concerning presidential succession planning and the entire process of transition from one president to another.” The hope was to identify trends and best practices, and to develop a uniquely Jesuit approach to presidential transition that could give a member school immediate traction in the face of an often undesired and unexpected vacancy in its top leadership position.

The term transition includes several elements. It begins when a school knows it needs to prepare for a new leader. In some cases schools prepare well in advance through succession planning. In other cases they are responding to the announced retirement of a sitting president. And in still others, it begins abruptly, with a sudden circumstance that incapacitate the current president. Transition continues through
the search, selection, hiring, announcement, orientation and ongoing evaluation and support of the new president. All of these elements are part of a successful transition.

There are different types of transitions. For instance, twelve of the last 40 transitions were from Jesuit presidents to lay, but in three transitions it went the other way, with Jesuits replacing lay presidents. Six of the transitions involved the use of an acting or interim president, presumably to provide more time for the preparation and search stages of a search for a permanent leader.

The goal of this study is to examine the experiences of these schools, to learn what did and did not work for them; to see where searches in Jesuit schools can follow processes used by other private schools and where they need to be different; and to help the JSEA offer processes, methods and tools, in readily usable form, to both improve the effectiveness of the school’s process, and to reduce the energy wasted by not knowing where to start.

**Methodology**

Data for the study was gathered in several ways

1. Using information that the JSEA already had about its member schools, from reports the schools voluntarily file with the Association but also from the knowledge and experience of the JSEA staff.

2. A survey of schools. A 31 question on-line survey was sent to the sitting presidents of 20 schools which had experienced transitions in the last three years. The presidents were asked to forward the survey link to the person or persons most knowledgeable about the process used. 18 of the 20 schools completed the survey.

3. Interviews. Ten of the schools which represented a variety of circumstances and approaches were invited to participate in follow-up interviews. Eight of these schools, plus one other not originally included, participated in the survey. Interviewees included, as appropriate, search chairs, search committee members, board chairs, presidents, candidates and search consultants. Interviewees were asked approximately 44 questions, depending on their knowledge of the process, and interviews lasted from an hour to an hour and a half each. Questions focused on preparation, timing, search committees, use of consultants, candidates, interviews and transition of the new president.

4. Materials. Schools were asked to provide samples of materials (communications, forms, timelines, etc.) that they found helpful in their process. These and materials, resources and literature from search firms and other organizations thought to be appropriate, were reviewed as part of the study.
**Lay vs. Jesuit candidates.**

Perhaps the most obvious trend in Jesuit school president transitions is the shift from Jesuit to non-Jesuit (primarily lay) presidents. The first permanent lay president of a Jesuit School was John Traynor, who was appointed president at Gonzaga Preparatory School in Spokane WA in 1995. By 2005, there were five lay presidents, four of whom were the first at their schools. As the chart below indicates, the number of lay presidents has been rising and the rate of increase has also been rising. The number of Jesuit presidents, however, did not begin to decline until 2011, in large part because new schools, mostly Cristo Rey schools, were being started and the Society was committing Jesuit leaders as a way of giving these schools a good start. But as these move into their second generation of leaders, the number of Jesuit presidents is declining and the trend line will soon cross the upward line of lay presidents.

![Chart: Jesuit vs. Non-Jesuit Presidents](chart.png)

The demographic statistics which drive this trend have been foreseen for decades. The Provincials of North America have been warning Jesuit schools for a number of years that there is no relief in sight from the trend of fewer Jesuits available to Jesuit schools, and those with administrative skills and interests are an even scarcer resource. Despite these warnings, institutions have been slow to adapt to a new reality. In the minds of the general public and even the parents, alumni and friends of Jesuit schools, the Jesuit brand is still anchored in the presence of actual Jesuits on campus. There has been a persistent state of denial which has hampered the transition, and in some cases forced Jesuits to accept unwanted leadership roles because schools were simply not prepared for the transition.

In the JSEA Presidential Transition Study all the schools who responded said they were open to lay as well as Jesuit candidates, yet interviews revealed that in most of those cases, the schools were hoping to find a Jesuit. Most of the search chairs confided that they had been disabused of their illusions about the availability of Jesuits in the course of their service on the board or search committee. But they said that the broader school community lagged behind in their understanding of the realities of Jesuit manpower.
and their consequent expectations of the search process. This has put search committees in the awkward position of either having a two-part search, with a separate track for Jesuit and lay candidates, or having to convince the school’s constituents that a lay president will be not only an inevitable outcome, but a virtuous one for the school. In either case, the search committee of a school not prepared for the transition to a lay president must deal with entrenched expectations in a compressed time-frame.

If present trends continue, finding a Jesuit president will become the exception, and not even be a high priority for search committees because of its very improbability. But in the meantime, schools value highly what Jesuits can bring in terms of spiritual leadership and strengthening of the Jesuit brand. Because of their formation, their sacramental leadership and the witness of their vows, they are still being sought as presidents of Jesuit schools. However, while nearly every school expressed a preference for a Jesuit president, most of them were clear that simply being a Jesuit was not enough. As with lay candidates, they were seeking Jesuits with leadership skills, who were willing and able to do the necessary fundraising and who could master the organizational complexities of the current legal, financial and cultural environment. Respondents in the study made it clear that the challenge was how to find qualified Jesuit candidates.

What most of the search committees learned was that the process for finding qualified Jesuit candidates was different than finding qualified lay candidates. Not only does this necessitate two separate processes, but keeping one from interfering with the other is a challenge. With lay candidates, most search committees agree the process needs to be open and transparent and cast as wide a net as possible. The basic approach is to define criteria, advertise broadly and require candidates to participate in a process that is inviting and respectful, but also rigorous and disclosive. While the scrutiny involved is also good for Jesuit candidates, there can be challenges to including them in the process.

In the first place, search committees found that in most provinces, before they can even talk to a candidate, they have to have the approval of his Provincial Superior (also known as the Provincial). Given the shortage of Jesuit manpower in comparison to the number of apostolates where they are needed and desired, Provincials feel they must manage assignments carefully. In some cases, they don’t want to tie up men in search processes and then have to pull them out to fill some need. But the difficulty of Jesuits participating in a conventional search also has to do with the Jesuit process for discerning how a man is to be missioned. In most search processes in the education field and beyond, discernment consists of a competitive assessment in which candidates seek the prize of an attractive appointment and must prove themselves to be the most attractive candidate. In Jesuit discernment, the issue is finding out what the Holy Spirit desires for the disposition of the individual Jesuit’s life. A Jesuit desires to be available to serve where he is most needed—by the Society of Jesus, by the Church, and ultimately by God. He must participate in this discernment process, but he has entrusted the ultimate disposition of his vocation to the discernment of his Provincial Superior. This is a manifestation of his vow of obedience, one of three vows he takes after his first year as a Jesuit.

Unfortunately, the discernment process just described does not overlay well with the traditional search process. In the first place, the individual Jesuit does not seek, is not supposed to seek, an attractive or
advantageous position. Secondly, whether he is the best person for the job is not determined by how well he competes with other candidates. This doesn’t mean that Jesuits won’t or can’t enter a competitive and open search process alongside lay people, but it means that many won’t, and when they do, there is a danger of distortion. On one hand, setting aside the subtle discernment process which is constitutive of Jesuit spirituality can deprive the school of the very depth it seeks in a Jesuit leader. On the other hand, lay candidates may feel ill-used if a Jesuit is chosen by what seems like a different set of criteria.

There were several ways the searches examined in this study dealt with this issue. Typically the search committee would begin by checking with their Provincial to see if any Jesuits were available in the province first. A few schools did some searching on their own so as to present particular names to the Provincial. These same schools may also have cast the net for names outside their own provinces, which would also have been presented to the school’s Provincial. If such names became viable candidates, the school’s Provincial would generally be enlisted to contact the candidate’s Provincial on the school’s behalf to determine his availability. In some searches, these efforts resulted in zero Jesuit candidates being available and in other cases one or two candidates were allowed and encouraged to apply. These names were then included in a multistage selection process along with lay candidates who had either been approached by the school directly, or responded to a posting. It is difficult to say whether Jesuit and lay candidates were consistently treated the same. Because of the desirability of Jesuit candidates and the vagaries of their availability, adjustments may have been made to accommodate the Jesuit candidates. These might have included waiving some of the experience, education or demonstrated skill requirements, or not requiring preliminary interviews, or having those conducted in a different way more consistent with the Ignatian discernment process.

Of the 18 schools in the study, eight had no Jesuit applicants, presumably because none were available, not because the school discouraged Jesuit applicants; two schools had no lay applicants, because the hiring authority decided *a priori* that the school would only consider a Jesuit president; and in one case there was a search process which had only lay applicants, but which could not produce a viable candidate for circumstantial reasons, so the Provincial made available and appointed a Jesuit.

**Who hires the president?**

At this point it is important to address the question of who actually hires the president. In general terms, the evolving practice of the Society of Jesus is that for a ministry, referred to as an apostolate or apostolic work, to be considered “Jesuit” it must have a living connection to the Society of Jesus, and more specifically, must be ultimately accountable to the General Superior of the Jesuits, at least in terms of its apostolic dimension. This living connection has varied manifestations. Becoming more common is a formal process for *sponsorship* by the Society of Jesus, a process analogous in some ways to accreditation. In other cases, the connection is made through the governance structure with a Jesuit-controlled governing board or a two-tiered board in which a Jesuit board of members delegates most governance authority to a predominantly lay governing board but retains certain powers that allow it to guarantee the Jesuit nature of the school. In all cases, though, the Provincial Superior for the province where the school is located must approve, or more accurately *mission*, the Director of the Work (the general title applied to any chief administrator of a Jesuit sponsored ministry). Rather than make
assumptions about how this plays out, search committees should review their by-laws and sponsorship agreements with the province on this question.

That having been said, of the 18 participant schools, seven perceived the authority to hire the president to rest with a predominantly lay governing board. Three of the schools reported the governing board recommended or maybe even chose the president, but the decision had to be approved by a Jesuit board of “corporate members” who represent the ownership of the school. In one school the appointment was made directly by the Provincial, though this was not considered by them a normative practice, but rather due to special circumstances. Another school reported that the decision had been delegated to the search committee. Again, these are the perceptions of those completing the surveys, and may have been de facto how the decisions were made in these cases. A careful review of school by-laws and province guidelines might show that technical authority resides elsewhere.

In general, the Society is tending toward having the selection made by the local governing board and approved by the Provincial. As a matter of practicality, the school needs a local authority to supervise and support the president, supervision and support which the Provincial simply cannot provide. As provinces are combining, the Provincial is becoming even more reliant on local boards to ensure ongoing fidelity to the Jesuit mission. In two-tiered structures, the Jesuit boards increasingly must be populated with Jesuits who are not directly involved in the work. As a consequence they also will not be able to provide the regular supervision and support that is required. On the other hand, the Provincial must have a final say in whom he mission as Director of a Jesuit Work. Most boards have learned therefore to include the Provincial and/or his Assistant for Secondary Education in the process in some way from the beginning, so that there is no danger of the candidate they choose not being acceptable to the Provincial.

**Candidate qualities.**

In the study, we asked schools what they were looking for in a candidate for president. Despite the concerns in some quarters that boards and search committees dominated by businesspeople would be drawn to a CEO in their own image, the top characteristic sought was the ability to foster the Ignatian charism of the school. The next most frequently mentioned, perhaps reflecting the increasing financial pressures on private schools, was skills with fundraising. The third most listed characteristic was that he or she be an effective leader. Secondary school experience and fiscal management skills were about even, followed by being a Catholic (a given for most of the schools) and a good communicator. These were followed by academic, collaborative and strategic skills. Search committees were conscious that their hopes to hire someone steeped in Jesuit spirituality and pedagogy, with demonstrated skills in fundraising and fiscal management, and the ability to collaboratively lead capable, creative and sometimes headstrong faculty, might be unrealistic. Those committees who were replacing an effective, long-term president were concerned about the expectations to fill his shoes, and those who were hiring after a struggling president felt they needed a super-hero to turn things around. And it is generally felt that if the new president is a lay person, and especially the first lay president at the school, even higher skills are expected to compensate for the fact that he or she is not a Jesuit.
Succession planning.

During the interviews, participant schools were asked whether they had done succession planning before it became known that their incumbent president was leaving. With few exceptions, they had not, or they felt their planning was minimal. In general schools have made provisions for emergency succession in the event of the sudden unavailability of the president. For example, board policy may provide that the principal should step in as the president pro tem in such a circumstance until the president is restored to office or the board can make longer-term arrangements.

By and large, however, boards have a reluctance to formally address the process for replacing an incumbent who may decide or be forced to vacate the position permanently. The reluctance comes from two sources. The first is the awkwardness felt discussing the negative circumstances, not wanting to send an effective candidate the message that the school is considering replacing her or him. There is generally enough normal friction between boards and presidents that the board doesn’t want to add to it. The second is the reluctance of the board to be painted into a corner. For instance, given a perceived shortage of viable candidates, it makes sense for the board, as part of a succession plan, to consider a process for growing replacement candidates internally. However, boards are afraid that this will be construed as a promise to promote an internal candidate. Conversely, if the board commits itself in its succession plan to a nation-wide search, it may feel it will be sending a negative message to internal candidates. In the face of these potential pitfalls, though they see the value of succession planning, boards have been diffident about formulating an actual plan.

Yet there is a sense that schools would benefit from having something in place. Half of the participant schools felt they had to develop their own process, and half relied on a consultant to provide a process. Those that developed their own process often felt they lost valuable time getting a consensus about it. Even those who used a consultant had to come to a consensus about that and then develop a process for selecting the firm.

One element of succession planning could address the establishment of a search committee. Of the 18 schools participating in the study, 16 set up search committees to steer the process. In one of the schools which did not, the president was a Jesuit appointed directly by the Provincial. In the other, an emergency interim was eventually confirmed by the board. At minimum, the board could spell out in advance some procedures for establishing a search committee.

Challenging issues.

Though every school and every search is different, the study sought to determine if there were common challenges encountered by Jesuit schools seeking a new president. These are difficult to quantify, but four schools reported that the anticipated move to their first lay president was a challenging issue. Three schools said replacing a long-serving president was a challenge. Although only two schools responded to this question by identifying the paucity of candidates, other comments suggest that nearly every school had some dissatisfaction with either the lack of lay candidates who understood Jesuit education and were ready to lead, or the lack of Jesuit candidates, or both. Other challenges mentioned were having several...
recent president transitions at the school, additional leadership changes at the same time, dealing with internal candidates, the amount of work involved, the demands of the Cristo Rey Model, the lack of a clear plan in place for the search and overlapping with the current president.

The study also asked about the top factors impacting the size of the candidate pool. The table below gives a summary of the factors that they felt helped to attract candidates:

<table>
<thead>
<tr>
<th>Positive Factors</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mission/tradition</td>
<td>10</td>
</tr>
<tr>
<td>Reputation</td>
<td>7</td>
</tr>
<tr>
<td>Finances</td>
<td>6</td>
</tr>
<tr>
<td>Location</td>
<td>6</td>
</tr>
<tr>
<td>Excellence of school</td>
<td>5</td>
</tr>
<tr>
<td>Salary</td>
<td>5</td>
</tr>
<tr>
<td>Supportive community</td>
<td>4</td>
</tr>
<tr>
<td>Campus</td>
<td>2</td>
</tr>
<tr>
<td>New model</td>
<td>2</td>
</tr>
<tr>
<td>Student Quality</td>
<td>2</td>
</tr>
<tr>
<td>Well-managed</td>
<td>2</td>
</tr>
<tr>
<td>Faculty quality</td>
<td>2</td>
</tr>
<tr>
<td>School size</td>
<td>1</td>
</tr>
</tbody>
</table>

Many of these factors would be characteristics that most Jesuit schools could say is true about them. In some ways, they paint an overall impression of the “brand” that candidates might attribute to a Jesuit school even before they know much about it.

The following table summarizes the factors which may have limited the size of their candidate pool:

<table>
<thead>
<tr>
<th>Negative Factors</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Desire for a Jesuit</td>
<td>3</td>
</tr>
<tr>
<td>Limited qualified candidates</td>
<td>3</td>
</tr>
<tr>
<td>Location</td>
<td>3</td>
</tr>
<tr>
<td>Cost of living</td>
<td>2</td>
</tr>
<tr>
<td>Instability</td>
<td>2</td>
</tr>
<tr>
<td>Salary</td>
<td>2</td>
</tr>
<tr>
<td>Board tensions</td>
<td>1</td>
</tr>
<tr>
<td>Lack of Jesuit community</td>
<td>1</td>
</tr>
<tr>
<td>Tenure of previous president</td>
<td>1</td>
</tr>
<tr>
<td>Timing</td>
<td>1</td>
</tr>
<tr>
<td>School Size</td>
<td>1</td>
</tr>
</tbody>
</table>
There is less clarity with the negative factors, and some are the same as the positive factors listed in the prior table. For instance, one school suggested that its location was both a positive factor for some and a negative factor for others. Another suggested that its salary would be attractive compared to other Catholic schools, but not compared to other independent schools.

**Candidate pools.**

In the independent school world, consultants report that competition for experienced candidates is increasing. Patrick Bassett, president of the National Association of Independent Schools (NAIS), says that there are over a hundred independent schools searching for heads each year. Matthew Heersche of Education Directions, Inc. (EDI) reported in an interview that the number of private school searches has grown to over 200 as the country comes out of the 2008 recession. There are several factors for this high level of competition for candidates. First of all, more positions are opening up. Baby-boomers are retiring in greater numbers and many who deferred their retirement or aspirations for another position because of the recession are feeling more comfortable about moving on. Added to this, consultants are seeing candidate pools with much higher numbers of “up-and-comers” who have not held a chief administrative position. Bassett reports that two thirds of the heads hired are not already leading another school. The general shortage of candidates is even more difficult for schools that require a practicing Catholic as head, and more difficult yet, for order-based schools which need leaders experienced with their particular charism.

For Jesuit school searches in the last three years, the average number per search of those “completing an application” was about 16. It must be understood that this number includes schools that intentionally did not cast a broad net. In some cases only one person, either an interim or an appointee by the Provincial, was considered. Additionally, responding school may have interpreted “completing an application” differently. An average of 1.2 Jesuits applied, with eight schools having no Jesuit apply. An average of 15 lay people (including one non-Jesuit religious) completed the application process.

The average number of people characterized as seriously considered candidates and/or finalists was about three. It should be noted that five schools ended up with only one finalist. At the end of the process, six of the 18 schools hired Jesuits, one a vowed religious, ten a lay permanent president and one a lay interim.

Eleven of the schools reported that the person eventually hired was someone known to them already and six reported that the person was not known beforehand. In only three cases did the person selected have prior experience as president of a Jesuit school. In another four, the person chosen had been the principal of a Jesuit school, and in three of those, of the same school. Of the six Jesuits chosen, three were from non-secondary apostolates.

While the quantity of candidates, at least the lay candidates, in the statistics above would not be a cause for concern, evaluating the quality is a more difficult matter. Of the nine schools interviewed in this study two went through a process without finding a suitable candidate. Three felt they had only one acceptable candidate, who if they had withdrawn would have meant a failed search. Failed searches are not unknown in the independent school world, nor in the universe of organizations generally. But Jesuit
schools are feeling that the line between having an effective leader who is also sufficiently steeped in Jesuit spirituality and pedagogy and having to compromise on one or the other, is dangerously thin.

**Processes used.**

In general the schools examined in this study used similar processes. They generally began by setting up a search committee. (In one of the two schools which did not, the president was a Jesuit appointed directly by the Provincial. In the other, an emergency interim was eventually confirmed without a search process.) The next step was to develop a profile for the type of candidate needed, often with input from the school’s various constituencies. For several of the schools the next step after that was to explore the availability of Jesuits in the local province or nationally. (At this time the school would also determine how the Provincial wanted to be involved in the process to assure his eventual approval of the final candidate.) Generally, after identifying one or two Jesuits whose Provincials would allow them to apply or finding that no Jesuits would be available, the job was posted in periodicals, on websites, and through associations, including the JSEA. Along with this the search committee or consultant would begin contacting other Jesuit schools and perhaps other Jesuit ministries to find candidates.

The next step was to cull from the resumes received from these efforts those who would clearly not be suitable candidates. From the remaining, five to eight semi-finalists would be selected and interviewed either face-to-face, by phone, Skype or by the consultant. From these a group of about three finalists would be selected for a visit to the school, which would include a tour, presentations or meetings with various constituent groups, including the board and a more in-depth interview by the search committee. Either the search committee or the consultant, or both, would check the references of the finalists, sometimes before and sometimes after the final interview. The search committee would decide on one candidate and present that person to the board for approval, along with background material supporting his or her candidacy. The board would approve the candidate and if required where there is a dual board structure, secure the approval of the Jesuit board. The Provincial would be notified and confirm his willingness to mission the person selected as Director of the Work. A rapid roll-out of announcements would then ensue to publicize the appointments and the search committee or the board would develop some sort of orientation or on-boarding process for the new president, dependent in great part on his or her availability.

There were many variations on the above described process, but rather than describe them in detail here, those which were effective will be discussed in the recommendations for best practices.

**Time required for the process.**

Consultants are finding that head of school searches are splitting into two “seasons.” In the ideal, which happens about half the time, the search begins in the spring before the incumbent’s final year. This allows for establishing a search committee, determining the school’s needs, profiling the ideal candidate and posting the position prior to the summer break. In the fall, the search committee would then interview semi-finalists and finalists and hopefully reach a decision before the Christmas break. Introduction to the community and some on-boarding activities would take place in the second semester.
and the new president would officially start on July 1st. Schools are attracted to this time schedule because they believe it gives them a jump on selecting from the candidate pool.

Often, however, it is not known that the incumbent will be leaving until sometime during his or her final year. This can be true with Jesuit presidents for whom pressure from other needs in the province and the Assistancy (which encompasses all the American provinces) is increasing as Jesuit manpower diminishes. If the impending vacancy is known by the beginning of the second semester, there is still time to conduct a search for the following year, although some steps of the process will need to be compressed. Veteran search consultants feel that these “second season” processes can still be successful because of the availability of prime candidates who were not chosen in the first season. However, if the process doesn’t get underway until February or March, the school may have to appoint an interim to give the process adequate time.

The experience of the Jesuit schools studied tended to corroborate this model. The average amount of time to complete the process, from the announcement of the incumbents departure to the start for his replacement, was 14.5 months. In 4-5 cases, it took longer than planned. The most common time-frame was 18 months (5), Followed by 9 months (4) and 12 months (2). In several cases the school was able to make the announcement six months to a year prior to when the new president’s term was scheduled to begin.

**Search consultants.**

Given the increasing complexity of searches in general and the competition for top candidates, the trend seems to be for more schools to invest in professional assistance. Certainly, in Jesuit schools, which no longer have the luxury of relying on the Provincial to make one or a few suitable Jesuit candidates available, the current number using counsel represents a marked increase over the last decade. In the current study, nine of the 18 responding schools reported using a search firm to conduct the process, another two respondents said they did it themselves but had a little help from a search firm. Seven indicated they conducted their process without the assistance of a search firm. In Appendix G are listed all the consultants who were reported as assisting with president searches at Jesuit Schools from 2010-11 to 2012-13.

**Support from the Province and JSEA.**

Participating schools were asked about the support they received from their local province and from the JSEA. It was clear that expectations were much higher for the former, in part because of the hope that the Provincial would encourage the availability of Jesuit candidates. Ten of the schools indicated a high level of satisfaction with the province’s support. Seven schools said they were supported by the province, but didn’t indicate that it was at a particularly high level. None of the schools reported that their provinces were not helpful.

The kinds of support schools mentioned receiving included:

- Clarity about the Provincial’s role vs. the board’s role
• Helping to find Jesuit candidates
• Helping to mediate with other provinces about Jesuit candidates
• Having a representative on the search committee
• Advice from the Provincial Assistant for Secondary Education (PASE)
• Clarity about willingness to accept a lay president
• Provincial or Provincial Assistant serving as a sounding board during the process

The kinds of support schools mentioned they would like to receive from the province:
• The most common request was for help finding candidates (particularly Jesuit candidates)
• Connected to that was help working with other provinces
• The second most common response was that nothing more was needed from the province.
• The third most common request was for leadership development to increase the pool of qualified candidates.
• Also mentioned were: alerting the search committee about thorny issues, helping with board formation and providing a job description for the president.

When asked about support received from the JSEA, ten schools responded that they used some level of assistance from JSEA. Of these, six stated explicitly that the materials were helpful. Four schools did not use materials from JSEA and two respondents were not sure. In interviews it became clear that search committees didn’t see it as necessarily the JSEA’s role to assist with searches, and what role it did play they seemed to have forgotten. In some cases an interviewee would need prompting to remember that JSEA materials were used to create the president job description, or that the job was posted on the JSEA website. The JSEA materials mentioned as being used were: job description, JSEA panel discussion(s), talking with other JSEA schools, a description of committee responsibilities and help advertising the position.

As far as what support schools might like from the JSEA, again the response was not as urgent as for the province. When asked whether a process with support materials from JSEA would have been helpful, 11 schools said this would have been. Another two said it might be and one said it probably would not. A few answers suggested that schools want to make sure that a process is adaptable to their unique circumstances, and not just a “cookie-cutter” approach. A similar response was given when asked if having JSEA’s assistance in identifying a pool of candidates would have helped. This is surprising given the anxiety the schools felt about finding qualified candidates. One possible explanation is that those involved in searches at JSEA member schools are still under the influence of an older model, in which the province is responsible for providing leadership. Because the JSEA hasn’t played that role in a way visible to them, they are not considering that possibility very seriously. During interviews, comments of search committee and board chairs suggest that they just aren’t aware of the programs JSEA has put in place for leadership. These are well-known to the school administrators, but simply aren’t on the boards’ radars at this point.

Here are comments survey respondents made about help the JSEA could provide:
“Perhaps as a clearing house for candidates in other provinces.”
“More engagement as a resource for leadership in secondary Jesuit schools.”
“Providing a tested structure and process would be very helpful for member schools. Also, it would be helpful to know what the schools in retrospect have come to believe are the core competencies required for the position, and some guidance on the strengths and weaknesses the schools can expect in Jesuit versus non-Jesuit candidates.”
“Find a way to corral the vast knowledge of past Board Chairs, current Chairs, Presidents, Provincials.”
“We were fortunate in our selection of publications to place our ads in. If one is new at this, it would be helpful to have a listing of the top 4-5 publications nationally that get the most responses.”

**Compensation**

Deciding competitive salaries can be a challenge for Jesuit schools. As one study participant pointed out, Jesuit school salaries tend to be higher than other Catholic schools, but less than non-faith-based schools. Comparisons with these schools may be of minimal help in determining what will attract a capable leader to a Jesuit school. Although Jesuit schools don’t generally compete with each other for employees, it is helpful to see how Jesuit schools compensate their presidents in order to get a sense of the range in this specialized but diverse market.

Every other year, the JSEA gathers salary data from member schools. Based on the most recent data, from the 2012-13 school year, the average salary for the president of a Jesuit school was $137,594. This had risen 4.5% from the previous survey in 2010-2011, when the average salary was $131,485. In 2012-13 the average salary of a lay president was $36,000 more that the average salary for a Jesuit president, reflecting an increase in cost schools generally face as they transition from Jesuit to lay presidents. But this may not be true on a case by case basis, especially if schools with Jesuit presidents have policies to compensate them at competitive market rates. The data in the chart below shows that the range of pay for Jesuit presidents is broad.

<table>
<thead>
<tr>
<th>2012-13</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Average president salary</strong></td>
<td>$137,594</td>
</tr>
<tr>
<td>Jesuit</td>
<td></td>
</tr>
<tr>
<td><strong>Average Jesuit president salary</strong></td>
<td>$127,100</td>
</tr>
<tr>
<td><strong>Range of Jesuit president salaries</strong></td>
<td>$47,000-200,715</td>
</tr>
<tr>
<td>Lay</td>
<td></td>
</tr>
<tr>
<td><strong>Average lay president salary</strong></td>
<td>$163,372</td>
</tr>
<tr>
<td><strong>Range of lay president salaries</strong></td>
<td>$90,000-240,000</td>
</tr>
</tbody>
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It should also be noted that much of the range in salaries for both Jesuit and lay presidents is due to differences in the cost of living and the reliance on salary to attract candidates to given locations. If we
adjust salaries for cost of living for the cities in which the schools are located, the range actually increases ($34,264-266,227). The data suggests that the high salaries paid in most of the larger metropolitan areas are more in line when adjusted for cost of living. But it also suggests that some lower cost markets may be paying disproportionately high salaries.

**Are searches for Jesuit schools different than those for other private schools?**

This question was put to the search consultants interviewed as part of the study. Most responded that the processes to be used are substantially the same, but Jesuit schools present some unique challenges. First, there is the need in Jesuit schools to first search for Jesuit candidates, a process which can’t be done via the usual outreach methods and is seen to involve pitfalls and political nuances.

Second is the lack of consensus among boards and search committees and even ambivalence in the minds of individual members about what kind of candidates will be acceptable. This can lead to hidden agendas and conflict blooming late in the process.

A third issue is that the candidate pool is substantially reduced by the requirement that the president be a Catholic, but unlike diocesan schools it is further reduced by the need for someone who is sufficiently steeped in the Ignatian charism to lead the school culture in a way that fosters it.

In all the conversations with search committee chairs and search consultants little mention was made of the need to incorporate an Ignatian discernment model into the search process. Nearly all of them used a process that was widely consultative and collaborative, an important element of Ignatian group discernment. But while schools may have incorporated prayer, reflection and the discernment of spirits, in only two cases was it discussed as constitutive elements of the process. Also little discussed in descriptions of the process used was the concept of formation, both the formation candidates have already received or that they will receive after they assume the responsibilities as president. And finally, an element that came to be understood by search committees only as the process unfolded was the uniqueness of the relationship with the Society of Jesus and how that shapes the selection of a president. Discernment, formation and the relationship with the Jesuits are three unique elements which need to be incorporated for a search to be authentically Ignatian, and these provide an opportunity for the JSEA to make a unique contribution to the presidential transition process.
Recommendations: Best search practices for Jesuit schools

The role of a president in a Jesuit school

With some variations, the chief administrator in a Jesuit school is generally the President. In most ways this role is similar to that of a chief administrator in any private school, but it is also different in important ways. In order to adopt the appropriate best practices for a leadership transition, it’s important to understand both what Jesuit school presidents have in common with the heads of other schools and how they differ. It is also important to understand the unique elements of the president’s role at a given school.

The position of president has its roots in the structure of the early Jesuit schools. A local superior, also called a rector (though canonically, not all local superiors are rectors), was assigned as the head of the local Jesuit community, and a principal, also a Jesuit, was tasked with running the school. As superior of the Jesuit community, the primary responsibility of the rector was cura personalis (care for the person) for the Jesuits who staffed the school. But he also had some responsibility for cura apostolica (care for the apostolate). The rector had the primary responsibility to the Provincial Superior (whom we call the Provincial) for the fidelity of the school to the Jesuit mission and assisted the principal in finding the resources the school needed, which generally went beyond what tuition could provide. Eventually, as schools incorporated, the rector was named the president of the corporation. Over time, it became clear that the rector’s responsibilities as president were becoming a full-time job in itself. It was also clear that the gifts needed to be a president were often different from those needed to be the superior of a Jesuit community. In the 1970’s, provinces were appointing separate presidents along with rectors and principals. As schools’ boards of trustees were empowered as caretakers of the Jesuit mission, their boards appointed presidents, who in turn hired principals, and the Provincial appointed the local superior, or rector.

In this current configuration, the president has three primary responsibilities: mission, resources and presence. The president is hired by the board of trustees to lead a team that will accomplish the mission of the school. As such, the president must lead the community in articulating what that mission is, help the community understand why it is important, identify the means to accomplish it and hold people accountable for their part in its accomplishment. In this role the president must represent the school and its mission to the broader community and represent the community and its needs to the school. The president will delegate nearly every aspect of running the school to someone else, but he or she can never give up responsibility for whether and how it pursues its mission.

The president is also responsible for assuring that the school has the resources it needs to accomplish its mission. While the president will be assisted in this role by a development director, a business officer and others, he or she must be prepared to devote a substantial portion of time to fundraising, marketing and
assuring an adequate and stable resource base for the school. The president’s role in cultivating the trust and participation of major donors and community and church organizations cannot be emphasized enough. No one can replace what he or she can bring to these relationships as the head of the school, and both the president and the president’s staff must carefully optimize this finite resource.

Finally, the president is often the human face and presence of an institution. If the president attends a funeral, the school is attending and saying how important the deceased was to it. If the president attends a music concert or spends a weekend with the juniors on retreat, he or she is sending a message about the importance of these activities. As important as presence is for a president, however, this aspect can be over-emphasized. Despite our tendency to identify a whole institution with one person, the reality is that it is many people. The more the broader community sees the depth of a school’s leadership and how the mission is embodied by all the administrators, faculty and staff, the healthier the school will be. And the president will be healthier if he or she can avoid the trap of feeling they are the sole spokesperson and personification of the school.

Appendix D is a general job description for the Office of the President prepared by JSEA and Appendix E is a description of the Qualities for the President developed by CAPE in 1989. Both can be used by schools to develop their own descriptions of the skills, qualities and experience it is looking for in a president.

**Relationships of the president**

**With the Board.** In most Jesuit schools, the president, like his or her counterparts at other private schools, is the highest ranking employee at the school. In general the president is hired, supervised and, if necessary, fired by a board. This can be a Board of Trustees, of Directors, or of Governors—whatever it is called, the president is generally the one employee who reports to that board, and all others report, directly or indirectly, to the president. In some cases other administrators may have some level of reporting responsibility directly to the board, but most schools have found that having more than one direct report greatly increases the board’s management responsibilities, causes ambiguity for the president and generally exceeds the board’s capacity for supervision. In Jesuit terms, the board has a responsibility for cura apostolica, that is, care for the school as an apostolate, or institution. But it also has a responsibility for cura personalis, that is, care at the level of the person. The board is a link in a chain of care that comes from the Church and the Society of Jesus and extends down to the individual student. For this chain of care to function properly, the board’s cura personalis is primarily focused on supporting and guiding the president, who in turn provides this support and guidance to those who report to him or her.

For a Jesuit school, the role of both the board and the president in this chain of care cannot be over-emphasized. While the philosophy and theology behind Jesuit education are critical, even more constitutive of the school’s Ignatian character is the way human relationships are lived out. This is true for the students, whom we hope more than anything will experience the loving, creative presence of God in their lives through such human relationships. But it is also true for the faculty, the staff and the administration. If a board assumes, explicitly or implicitly, that it can simply hire a new president and
expect that person to generate the chain of care without their constant support, they are already veering off the foundation of Jesuit education.

**With the Society of Jesus.** The president of a Jesuit school has another title, not often used, but critical to understanding his or her role. From a Jesuit perspective the president is the *Director of a Jesuit Work*. As a Director of the Work, the president is missioned by the Society of Jesus, and more specifically by the *Major Superior* (known also as the *Provincial Superior*, or simply as the *Provincial*) to lead the school as a Jesuit work. According to its 1996 document, *Guidelines for the Relationship between the Superior and the Director of the Work*, the Society says “The Director of a Jesuit work receives a mission or confirmation of his or her appointment from the major superior [Provincial], and is accountable to him, for the fulfillment, according to our way of proceeding, of the institution's apostolic mission. The authority of the director is that of the Society delegated for the apostolic task.” (p8).

The Provincial doesn’t have immediate supervisory responsibility for the president, but the president is ultimately responsible to the Provincial for the school’s Jesuit mission. What does the Provincial expect of the president as Director of the Work? In the previously cited document, the Society says that Directors are “responsible for the general administration of the works, together with the inspiration, apostolic orientation, and implementation of their mission. They are responsible, in collaboration with others, for discernment supporting the mission. They are accountable for this mission, through appropriate lines of authority, to the major superior [Provincial].” (p2). Fr. Michael Tunney SJ, when he was on the Board of Trustees for Canisius High School, articulated what is expected of the president as Director of the Work when he said, “Guided by the Ignatian vision, the Director plays the lead role in providing inspiration, developing a common vision, and preserving unity within the school. Further, the Director animates and communicates this vision to external communities.”

“The major superior,” the *Guidelines* document goes on to state, “has his own relationship, as a superior, to each director of a work. This relationship may be direct or in conjunction with some other ecclesiastical or governing structure [e.g. the board]. Because of the apostolic importance of the director of the work for the Society's mission, the major superior should exercise great care in his or her appointment.” (p12). From this can be seen the important role that the Provincial plays in the chain of care for a Jesuit school, a chain that includes the president, and that the Provincial therefore has an important role in the president’s selection. This role can be carried out both directly, and indirectly through a Provincial Assistant for Secondary (and sometimes pre-secondary) Education, or PASE for short.

The *Guidelines* document further acknowledges that, though the Provincial must approve the director, he will not, in the case of Jesuit schools, take the hiring authority out of the hands of the school’s board. “In situations where a board of trustees or some other body appoints the director of a Jesuit work, the major superior remains ultimately responsible to assure that, under the guardianship of the board and the director, the work remains faithful to its Jesuit character. The major superior confirms the appointment of the director and his or her apostolic mission according to accepted local practice” (p13).
The Provincial not only missions the president as the Director of the Work, he also missions all Jesuits in his province, a point which has important implications for the search process. In any search, the Provincial has the final say about whether a lay or Jesuit candidate can be missioned by him to a Jesuit school. In the case of a school hoping to hire a Jesuit, he also has an important role at the beginning of the process, because even to apply, a Jesuit will need his Provincial’s permission. In most provinces, the Provincial will also want the school to contact him or his Assistant for Secondary Education before approaching a potential Jesuit candidate. This will be discussed in greater detail below, under Finding the next president of a Jesuit school.

As search committees begin their work of selecting a candidate for president, it is important that they understand the role of the Provincial and involve him or his delegates in appropriate ways. For more information about the relationship of the Provincial, see Ways a Provincial Relates to a School, Jesuit Conference Board (American Assistancy) 2005 and The Provincial’s Care for Secondary and Pre-Secondary Education, PASE, 2005.

With the Catholic Church. Just as the president is a Director of a Jesuit Work and in that role must be a vital link between the school and the Society of Jesus, so also the president is a link between the school and the Catholic Church. One Provincial Assistant interviewed during the JSEA study pointed out that this is sometimes forgotten, and it is a role that might be uncomfortable for many potential candidates. In this role, the president is an important figure in the local Catholic community and, whether he or she wants to or not, speaks for the Church. For the students in the school, the president will to a great extent be the face of the Church. Once in this role a person no longer has the luxury of expressing private views and have them seen as just that. People who aren’t used to that sort of responsibility often have difficulty adjusting to it.

A second dimension of this role of the president as Catholic leader is the need to work with other ecclesiastical officials—the bishop, the superintendent of schools, the schools office staff, local pastors, the heads of other Catholic organizations—for the good of the Church. Understanding Church structure, how decisions are made, some principles of Canon Law, even the political dynamics of the local and national Church will be important for a new president to learn in order to foster the Jesuit and Catholic identity of the school. And since Jesuit ministries are called by the Church to serve at the frontiers, this can even cause tensions with other Catholics, particularly those with responsibility for the institutional Church. Added to this is the heightened sense of responsibility which local bishops feel for institutions in their dioceses since the 1983 revision of the Code of Canon Law and the religion curriculum parameters approved by the US Conference of Catholic Bishops. The president must be able to live in and navigate through this landscape, and gracefully lead the school through it as well.

The search process needs to uncover how well suited candidates are for this sort of public presence within and on behalf of the Church, and the scrutiny that may come with it. Search committee members are understandably uncomfortable asking questions about how candidates are practicing the Catholic faith because they don’t want to be perceived as being on a witch-hunt. And veterans of search processes
outside of faith-based education may instinctively avoid them because of perceived legal prohibitions. But where these would not be job-related issues in most settings, and therefore inappropriate and illegal, the committee has a right and responsibility to know whether the candidate’s personal conduct and public views will be consistent with what the school is teaching.

**With the Principal.**¹ In Jesuit schools, at the core of the apostolic team is the relationship between the president and the principal. This structure once unique to Jesuit schools is becoming more common in other private schools as they face the challenges ahead.

Despite its firm roots in the history of Jesuit education, the president-principal model can be confusing to people not familiar with it. It sheds some light to compare it to other better-known administrative models. The president performs many of the functions of a superintendent in a public school system, freeing the principal to focus on the educational process within the building. Comparing it to a common business management model, the president would be analogous to a chief executive officer (CEO) and the principal a chief operating officer (COO). In many ways the model is also similar to how a president and provost function in a college setting.

To the principal is delegated the leadership of the school’s core mission activity as a school: the curriculum, students’ spiritual formation, the extra-curriculars and all the programs that support these. The principal supervises the majority of the school’s employees and sees to their spiritual, personal and professional development. Like the president and in conjunction with her, the principal is responsible for mission. His work is hugely important in shaping what the mission is, how it is understood and how it is pursued. The principal has some responsibility for resources, but generally his focus is internal. Nevertheless, the principal must manage a large budget and play a key role in assuring the financial stability of the school. And the principal, like the president, has a responsibility to be the presence of the school, especially internally, but to the external community to some extent as well.

Because the roles of the president and the principal are not always familiar to the school’s publics and because there is so much overlap, there can be confusion. Even for the president and principal themselves, the expectations of others and the overlap of leadership responsibilities can lead to confusion. Studies by the JSEA in both 1991 and 2005 have indicated that tensions between the president and principal are not uncommon. These may arise because each is trying to exercise important leadership responsibilities and that is difficult to do without impinging on the authority of the other. For instance the principal may have determined that a teacher who is popular, but nevertheless not living up to her responsibilities, must be terminated. The school policy may be that only the president has the authority to terminate employment, and the president may be reluctant to lose a popular teacher. The president may feel that the principal shouldn’t be making that call, but the principal may feel powerless if he works patiently and follows evaluation procedures but can’t expect that his decision will be upheld by the president.

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Both positions require the exercise of authority, but what happens when one interferes with the other? Both require vision, but what happens when visions contradict? The easy answer would be that the president is the boss so her authority prevails. But, considering the importance of the principal’s position, and the immense responsibility he has, the president would do well to exercise this option cautiously. The school is not served by one of them being a strong leader and the other not. They both need to be strong leaders, and they need to work together.

The president and the principal are in a position to model collaborative leadership, trust, and good communication to the rest of the school. Like parents in a family, if they can’t get on the same page, the result will be some level of dysfunction. They owe it to themselves and the apostolic community they lead to attend to their relationship and make sure it is healthy. A good way to do that is to pay attention to the ways things can go wrong.

Conflict can enter the president-principal relationship when both have the same skill-sets. We have a tendency in stressful circumstances to use the tools that have worked for us in the past. If I had been a successful principal and am now president, and I were worried about whether I was doing a good enough job, it would be natural for me to want to step into areas like curriculum or faculty development and exert influence where I know I have skill. It takes a great deal of trust to let go of those areas. It means trusting someone else (who may have far less experience than I) to manage them. It means trusting myself to develop new skills that a president needs which I haven’t needed before. And it means trusting that the community will be patient with me and give me time to work through the awkwardness and develop those new skills.

Conflict can also arise from the opposite situation, where the president and principal have completely different skillsets. A president well versed in finance and management may have trouble finding common language with a principal whose strength is curriculum development. Each may be aware of blind spots in the other’s view of how the school works and even doubt each other’s competence in areas they consider key. If they can resolve the communication issues and develop a respect for what each brings to the relationship, the complementary skill sets can be a valuable asset for the school.

Research by the JSEA suggests that conflict between the president and the principal occurs most commonly when there is a lack of trust. The most common reasons for this lack of trust according to surveys of presidents and principals are a lack of communication; unclear delineation of roles resulting in overstepping (by principals) or micro-management (by presidents); a lack of understanding or respect for each other’s roles and responsibilities; and divergent understandings of the school’s mission.

The presidents and principals surveyed by the JSEA offered several suggestions for strengthening the relationship. Leading the list was the need for open and honest communication with both formal and informal meetings on a regular basis. Others suggestions included clarification of roles, improved evaluation processes, collaborative decision-making, mutual public support, shared prayer and the assumption of good will.
With Benefactors. It should not be surprising that fundraising was a consistent theme in skills sought by searches examined in the JSEA Presidential Transition Study. To accomplish their missions to the full, especially while providing access to the middle-class and poor, Jesuit schools, as all private schools, are increasingly relying on fundraising. With this increased reliance comes increased competition. So schools are looking for a president who will give them an edge in in the philanthropic marketplace. Jesuit schools are looking for someone with the ability to develop relationships with major benefactors, and to do so in a way that doesn’t compromise but sustains the school’s spiritual mission and commitment to the poor.

With the Faculty. A president can be extraordinarily effective gathering support from those outside the school, but he or she will also need to have the support of those inside as well. Although the principal is more closely involved with the faculty, presidents can get in trouble if they become disconnected from the faculty. Part of the chain of care for teachers is knowing that the person responsible for setting policies and making budget decisions is someone who cares about them and understands the challenges they face. While he or she is working with great generosity outside the school to find resources to support their work, the president needs to spend time interacting with the faculty, the staff and the vice-principal level administrators, without stepping on the principal’s toes, to keep in touch and to assure them that he/she has their interests at heart. It will both fuel his or her passion for the school on whose behalf he labors and will reassure the troops, who also labor but can easily feel unappreciated.

Expectations of the president

What makes the job of president difficult is that there are four distinct sub-systems, or models, within a Jesuit school and each has to be functional not only in itself, but in how it supports the other three. These are the Business, Pedagogical, Apostolic and Community Models. Most who serve on search committees will be familiar with business models and know that no business can survive without a sound one. Jesuit schools are businesses, too, and the fact that search committees place fundraising and financial management high on their wish list suggests that they understand this. Even higher on that list however is someone who will sustain and strengthen the school’s Jesuit mission. This is because Jesuit schools need a healthy Apostolic Model to carry on the evangelical mission entrusted to it by the Society, the Church and ultimately, we believe, Christ himself. Because they are schools, Jesuit schools also need a Pedagogical Model, which successfully educates the students and prepares them for college and life beyond. And to do all this the Jesuit school needs a Community Model, which fosters a loving and supportive environment in which students can flourish as they experience the loving, creative presence of God in human relationships.

Employees in a given school tend to live in one of these models or another, and often don’t comprehend how the others work, or in some cases, why they’re even important. We would like to have a president who is well-versed in each of these models and who can orchestrate how they function together. Often, however, the candidates are those employees who have spent their careers in one or two of these models and understand them well, but have deficits in the others. For instance, principals, the most frequent prior position held by new presidents, might be adept at the Pedagogical Model, and understand well some
aspects of the Apostolic and Community Models, but lack background in the Business Model. A former development director might understand the Business Model and important parts of the Community Model, and maybe parts of the Apostolic, but lack skills with the Pedagogical Model.

**Non-negotiable expectations.** Search committees generally have to accept that no one candidate will have all the requisite skills needed for a president to be successful. So it’s helpful to know what the non-negotiables are and what can be back-filled once the president is in place.

- **Commitment to the Jesuit mission:** Based on this study, the one characteristic that Jesuit schools don’t feel they can sacrifice in a president is an authentic commitment to the school’s Catholic and Jesuit mission. There may be gaps in a candidate’s understanding and experience related to Church teaching or their experience of Jesuit spirituality that can be gained later. But the antecedent to these must be a demonstrated commitment to a deepening relationship with God, the Church and the spirituality of St. Ignatius. Even as sanguine as the Jesuits are about the ability of the Holy Spirit to accomplish the divine plan through people of many faith journeys, no Jesuit school would hire a president in the hope that he or she would develop an interest in that spirituality which forms its very foundation.

- **Leadership:** During the study, Fr. Vin Biagi, Provincial Assistant for the New York Province, who has been involved in many presidential searches, was emphatic that commitment to mission isn’t enough. The president needs to possess excellent leadership skills. Sean Agniel, PASE for the Missouri Province, seconded this. While leadership skills can be learned, they must be built on core characteristics like eloquence, self-confidence, self-awareness, trust, courage, resiliency and generosity that can be increased in a president but not engendered. Furthermore, as Fr. Biagi points out, candidates need to have had meaningful leadership experience.

- **Experience with Jesuit education:** It is difficult to imagine that someone could lead a Jesuit school without having had some significant personal experience with Jesuit education. Some would argue that not just experience but experience working in Jesuit schools or at least experience in schools would be a non-negotiable. Not having this experience makes for a steep learning curve for an incoming president, who must get used to the language, rhythm and culture of schools. It also is a point of credibility with faculty who may question how someone from another profession can lead them in theirs. Nevertheless, people with a commitment to the Jesuit mission and leadership skills have made that transition, because unlike these other two characteristics, proficiency with education can be learned. The question the search committee needs to ask is whether the candidate’s other gifts will buy him or her enough time to do so. Most of the candidates who have made a successful transition from outside education were Jesuits. And as one search chair remarked, that gives them some benefit of the doubt to work with for a while.
**Other expectations.** If commitment to mission, the ability to lead, and experience with Jesuit education are the three non-negotiables, search committees have found that there are other characteristics which are highly desired but are subject to inevitable trade-offs. They seek someone with enough background in pedagogy to be an instructional leader, but also be a skilled fundraiser and financial manager. They want someone who is relational, yet decisive and not overly sensitive to criticism. They want, as one placement ad said, a strategic thinker who will care deeply for the welfare of each student, faculty member and staff member, a superb communicator, a fundraiser who effectively leads campaigns, and who has direct teaching experience, a collaborative leader who gives others authority to lead and an effective manager who oversees numerous, diverse functions. These are indeed the characteristics we want in our presidents, and we should seek them all. But after the non-negotiables are covered, we may find that none of the candidates available has everything we’re hoping for. In light of this, the search committee has to be prepared to do two things. First, it needs a good process for sorting out how to handle trade-offs in the qualities, skills and experience offered by candidates. Second, it needs to prepare the board to provide ongoing mentorship, guidance and support to help the person chosen grow in those areas where they have deficits. Too often search committees and even boards can feel their task is accomplished once the president is hired. But in many ways the job is just beginning, and some of the greatest value a board gives to a school is in how it helps the president grow. More on that later, under *The next step: supporting the new president.*
Finding the next President
of a Jesuit school

If you’re reading these words there is a good chance you are a board chair or board member of a Jesuit school that has recently learned of the impending departure of its current president. Or you’ve been asked to chair a search committee to find his or her replacement. Probably two important thoughts have been much on your mind. The first is that you are not the first person who has had the responsibility to find a new, and hopefully outstanding, head of an organization. Searches for CEOs and organizational leaders are happening all the time. Over a hundred independent schools are searching for outstanding new heads each year. You may yourself have participated in many searches. So you know that there is a well-developed methodology for what you are about to undertake, and you probably have no desire to re-invent the wheel.

The second thought that may occupy your waking moments is that the future of your school as a Jesuit school, one which continues to develop that charism and culture which make it unique, will depend in great part on the qualities of its next leader. Because Jesuit schools are different, they require a different sort of leader, and you may wonder if that means they require a different sort of presidential search process.

On one hand, a search is a search, and you want to take advantage of the experience of those who have done it successfully for other organizations. On the other hand, you don’t want to lose track of what makes your school special by following in lock-step what has worked for other schools. Recognizing this dilemma, the Jesuit Secondary Education Association commissioned a study of twenty of its member schools that hired new presidents during a three year period from 2011 to 2013, to identify best practices for Jesuit schools doing presidential searches. That study suggests that most of the best practices can be borrowed from other types of schools and other industries, but member schools have learned that there are a few junctures in the search process crucial to a Jesuit school, for which the experience of other schools falls short of what we need.

In the following pages, we will give an overview of the presidential search process. The goal is to make board members and search committee members aware of the components needed for a successful search. For those practices unique to Jesuit schools, we will go into greater depth, because this may be the only source for learning about such practices. For the rest of the process, those elements that would be common to any private school, we would encourage you to read the excellent handbook prepared by the National Association of Independent Schools (www.nais.org) called the NAIS Head Search Handbook. If you are using a search consultant, you may not need to read the NAIS book because the consultant will presumably be aware of all the processes and nuances that it covers. You can also find a concise but thorough summary of the whole process in Appendix A, the JSEA Presidential Search Checklist. But you will still need to read the following so that you have an overall understanding of the process before you
Planning for a transition.

Those who are entrusted with the responsibility of leading a presidential search are often frustrated with the lack of planning in place when the incumbent announces that he or she will be leaving the position. Nevertheless, schools are inhibited in preparing for a possible vacancy in the office by a desire not to send a negative message to the incumbent, nor paint itself into a corner over the process to be used. As noted earlier, if you’re reading this book, it’s probably already too late to do succession planning for this vacancy, but it can still be recommended to the board in anticipation of the next one. A good example of a succession plan, from Jesuit High School in New Orleans, can be found in Appendix B.

Notwithstanding the limitations stated above, the JSEA Study respondents suggested a few elements of succession planning that boards should commit to at a minimum. The first is to have a process for a Transition Committee, separate from a search committee, which formulates on behalf of the board the search process to be used. Normally a transition is not expected, but such a transition committee can still serve a vital function by allowing the school to begin moving quickly without committing to a particular process. The board’s policy governing the transition committee should provide flexible but clear directions. For instance it can state that in the event of a vacancy or anticipated vacancy, the board chair shall appoint a transition committee which shall recommend a search process to the board. Membership should include the board chair, a representative from the Provincial, one or two board members and possibly a past chair who can assure the school’s stakeholders of continuity through the transition. The transition committee can decide whether a search firm will be used, determine potential chair and members of a search committee, set up a preliminary time-line and formulate the charter and goals of the search committee, subject to approval by the board.

Secondly, Jesuit schools in the JSEA Study were either glad they had or wished they had an outline of the search process ready. That is one of the purposes of this current document, to serve as an initial playbook that those who will be responsible for the process can use to get themselves up to speed quickly. While many decisions about the process cannot and should not be made in advance, having a flexible template to work from will assist the process in the early stages.

Thirdly, schools find that having a current strategic plan is helpful in knowing what kind of leader they need, what sorts of questions to ask, and how to explain the school’s vision to candidates. The caveat here is again the need for flexibility. In hiring a new leader, the school must be prepared to let him or her work with them to re-look at the plan in the framework of new skills and vision that they might be bringing to the school. But again, schools have found having an existing plan that needs to be revised is better for the succession process than having no plan at all.
Ignatian discernment.

Now we come to one of those elements that are unique to Jesuit schools: how we make decisions. As the school’s leadership thinks about how it will carry on its search, it must think early on about how it will incorporate the Jesuit approach to discernment. Discernment is a critical dimension of the Jesuit charism and it’s more than just a fancier word for decision-making.

Before we discuss what discernment is, however, let’s talk about who does it. When decision-making gets problematic, it is often because it is unclear who is making the decision or what the roles of various people are in decision-making. In the governance of the Society of Jesus, a consultative model of decision-making is generally used. In this model certain groups or individuals are charged with making decisions on behalf of the organization, but they are also charged to consult with those who would have on-the-ground knowledge and who will be affected by that decision. In the Society the Provincial has ultimate authority and responsibility to make decisions about the men and ministries in his province. It’s not a magisterial model, because the Provincial can’t simply ignore the input of others and do what serves his own needs best. He must, depending on the situation, get the input of his official consultors, or the man he is missioning, or the people in the affected ministry. But it’s also not a consensus model because all these people who are consulted don’t have veto power or even a vote. They must trust that the Provincial has heard their input, will take it into account and will decide based on all the information which he has by virtue of the position in which God has placed him.

It will be important to clarify who is the discernment leader in the case of the hiring of the new president. It often is a little murky. Generally the board has the responsibility to hire the president, so in that sense they are collectively the discernment leaders. The Provincial alone has the authority to mission the president as Director of a Jesuit Work. So for that piece he is the chief discerner. But generally, the Provincial will accept the judgment of the local board unless he sees some reason why the person cannot meet the criteria of a Director of a Jesuit Work. The board in its turn will often delegate the selection process to the search committee. While it will generally retain final, formal authority for approval, it will empower the search committee to bring the board its choice based on the rigorous process it has executed. While the board could countermand their recommendation, they generally will trust the choice of a top candidate made on their behalf.

Where these conditions govern the process, the search committee becomes de facto, with certain conditions as stated above, the discernment group for the selection process of the new president. As a result, to carry out their role in fidelity to the Jesuit charism, they need to have an understanding of Ignatian discernment.

The Jesuit understanding of discernment goes back to St. Ignatius’s Rules for Discernment, which he lays out at several points in the Spiritual Exercises. Actually it goes back even further to the very point when Ignatius was being transformed from a selfish, vain and unremarkable member of minor nobility to the inspiring saint we look to today. After his injury at Pamplona when he lay for weeks on his convalescent bed, he tried to distract himself fantasizing about performing acts of valor to win great glory for himself.
Amidst these efforts at self-gratification, his mind was also drawn to the exploits of the saints and Jesus himself, which he read about in the only books available in his home in Loyola.

Ignatius began to realize that something more was happening, that various spirits were at work in him pulling him this way and that. Eventually he began to see that the Holy Spirit, by means of offering consolations deeper than he had previously known, was drawing him in a different life direction. Ignatius was struck, as many of us would be, that God was actually at work in his life, actually trying to communicate his will to Ignatius. He also realized that listening to what God was saying required an openness, made possible at first by his solitude and inability to distract himself but eventually dependent on his own cultivation of a disposition to listen. This insight, that God has a will for his life, and that it is possible for him to discern and cooperate with that will is what, perhaps more than anything, animates and shapes the Jesuit way of proceeding to this day. It is, for instance, at the foundation of the spirituality and leadership style of Pope Francis, the first Jesuit pope.

What can be said of the way God acts in the life of an individual, can also be said of a school. The essence of a Jesuit school is not JUG, or being all-boys, or having bright college-bound students and over-achieving athletic teams. It’s not even primarily about having students who have imbibed Catholic doctrine, are committed to service and social justice and are people of good character. The essence is a desire to discern God’s will and to follow it as Ignatius did, no matter how challenging, or unexpected, it may be. This is the meaning of the Jesuit motto, Ad Majorem Dei Gloriam (AMDG): for the Greater Glory of God.

So how does a school set up a search process that serves first and foremost the Greater Glory of God? How can we begin the next chapter in our school’s history in a way that emulates how Ignatius began the next chapter in his life? Is there something more than beginning meetings with a prayer and getting down to business as usual? Is there a formula or a process we can incorporate into our search process that brings it to the level of discernment and not just collective decision-making?

**Ground rules for discernment.** Further along in this section a process will be suggested, based on both Ignatian spirituality and pedagogy, but discernment can’t be boiled down to a set of steps. In his *Rules for Discernment*, Ignatius actually gives a number of different processes an individual can use to help make decisions. But more important than the process is the disposition of the people undertaking the process. Based on the experience of and input from many Jesuits and lay leaders in Jesuit ministries, there are some ground rules:

1. *All desire that, above all, the outcome of the deliberation be in accord with God’s will and commit themselves in prayer to that outcome.* Of course we all want to do God’s will, but most of the time God’s will is so unclear that we simply resign ourselves to making our decisions by our own lights as best we can. That’s natural, and probably the way God designed us. But Ignatius would tell us not to overestimate the importance of what we do in comparison to what God does. God is after all the all-powerful one in this relationship. One of the things God has
chosen to do is give us freedom, and Ignatius tells us that he is careful not to take it back. So he wants us to invite him into our lives where he can act *with* us, not *in spite of* us. Simply the act of telling God, as a steering committee and as individual members of that committee, that we want to do his will and asking for his grace to do so gives him operating room to begin making a difference in the work we are about to undertake.

2. **All are willing to listen deeply, to themselves, to the other members of the committee, and to God.** It’s difficult to define the difference between listening and listening deeply, but we probably have all experienced the difference. Listening is hearing a candidate admit he has had difficulty managing budgets and crossing him off the list. Listening deeply means reflecting on whether this is a sign of his honesty and self-knowledge and on what he means by “difficulty,” and taking the opportunity to learn how he handles those difficulties. Listening deeply means being open to what the Holy Spirit may be saying beyond the face value of the words a candidate or a fellow search committee member uses.

3. **All will trust that others are speaking with good intentions and bringing up information that is important to the issue.** This disposition is important for working with our colleagues on the committee. We may be aware, or think we are aware, of some people’s agendas. We may have a tendency to write them off because we think we know the motives behind what they say. But we usually don’t, or at least not all of them. For this reason, Ignatius at beginning of the *Spiritual Exercises* advises the persons who will give and receive them that we should always give a good interpretation to a neighbor’s statement rather than condemn it. Even if someone is constrained by ulterior motives or an agenda they have difficulty letting go of, somewhere in what they are saying is something that needs to be heard. Sometimes we need to let go of our own agendas to hear it. As one Jesuit president used to say, the Holy Spirit can speak its word to us through the heart of anyone and so we’d better be ready to listen.

4. **A willingness to consider all sides of the issue.** Part of us doesn’t want to let additional complexity be introduced into an issue. If we’re convinced of the truth of an interpretation we are impatient when it gets muddied up with other less probable viewpoints. If I am convinced, for example, that a candidate shows what I see as signs of indecisiveness, it may be hard to listen to another committee member who sees it as openness and ability to collaborate. I might feel a responsibility to dismiss that viewpoint because of my experience of bad outcomes with someone who seemed similar. But in discernment, I must share my viewpoint and then let go, readying myself to listen to others.

5. **A detachment that seeks not to win the argument or pursue my interests.** The whole point of the *Spiritual Exercises* is to find our interior freedom, which Ignatius sees as God’s unconditional gift to us, so that we can be moved to the good God has in mind for us. Just as we have to resist judging the motives and agendas of others, we have to be honest about our own. Our assumptions and biases generally have some reasonable foundation in our experiences, but we often cling to them and use well-honed advocacy skills to defend them. In other areas of our professional lives decisions are often made by what is called a competitive assessment. Advocates make the strongest possible case for their side, and the argument that wins is presumably the best. As useful as this may be in law, politics or business, competitive assessment is antithetical to discernment, in which all work cooperatively to bring the best choice to light.
6. **A willingness to work through and not avoid conflict.** Not trying to win the argument does not mean that we are afraid to share our viewpoint, even if it may be upsetting to others. Sometimes it can take great courage to offer a viewpoint which one feels is at odds with the majority and it takes even greater courage to do so without putting others on the defensive or using passive aggressive methods like sarcasm. But it is possible to disagree with others gently but articulately. It is often the responsibility of the chair to make sure the committee isn’t avoiding hard decisions in order not to hurt people’s feelings.

**Building trust.** Just bringing these rules back to the committee’s attention at various points in the process will improve the quality of its discernment, but they will be more deeply imbibed if the committee has a chance to get to know each other as people. When a group meets to accomplish some task, they tend to think of themselves only in terms of accomplishing that task. They can view each other in an instrumental way, as aiding or opposing the accomplishment of the outcomes they have in mind. But committees do their best discernment based on a foundation of trust between members. Trust allows for greater disclosure, more honest sharing of information and viewpoints and greater willingness to come to a new viewpoint. Building that trust requires that committee members view each other as more than committee members. On a committee as important as this, we need to see others as an “I”, as human beings striving to accomplish the good as best they can, as we are. The best investment a search committee can make in becoming good discerners is to spend some time at the front end getting to know each other and building the loyalty and trust that allows them to approach their challenge as a team. This is a tough sell, given that search committees are usually recruited from busy persons with Type A personalities, who are prone to consider anything but executing the business at hand as unessential. One of the search chairs interviewed in the JSEA Study said that he was able to convince his colleagues on the committee to do this. They spent several meetings getting to know each other, ate dinner together and even had a session in which they talked openly about the biases they brought into the process. As they did so, they found they were able trust each other more, and even let go of their own predispositions. He said it turned out to be a great blessing because later in the process, when they had to work through some difficult decisions, they trusted each other enough to sort things out together. While it would be optimal for the search committee to begin its work together with an overnight retreat off-site, even just sharing a few meals, the opportunity to break bread and laugh together, would allow them to get to know each other as human beings and yield rich dividends as the process unfolds.

**Coming to a decision.** The six ground rules listed above should be used and referred to throughout the process, especially during opening prayers for committee meetings, or when the committee feels it isn’t making progress. When it comes to making important decisions, especially the decision about the final candidate, the key to group discernment is moving through the stages of the decision deliberately and thoughtfully. In order to let the Holy Spirit exert influence, we have to make sure no important steps are skipped and resist rushing to the conclusion. The teachers in our schools have a similar challenge. Even when they know the answers already and want to just give those answers to their students, Ignatian educators know they must lead them to insight by observing the dynamics of what is called the Ignatian Pedagogical Paradigm.
The Ignatian Pedagogical Paradigm (IPP) is based on Ignatius’s understanding of human spiritual growth, and has become the foundation of the Jesuit school’s understanding of how we learn as well. There is in us a natural dynamic that begins with understanding Context, grounding ourselves in Experience, taking time for deeper Reflection, taking decisive Action, and then making an Evaluation of our outcomes to lay the basis for future decisions. Discernment is essentially a learning process—learning as best we can what is the right course of action and what is God’s will. Just as we ask our faculties to audit their teaching methods to make sure all of these steps are honored, search committees would do well, especially when they are feeling stuck or uneasy about their direction, to ask if one of these steps is getting short shrift.

When one looks at effective search processes conducted by schools and search professionals, one sees the IPP at play. The committee begins with Context by deepening its understanding of the position description, the needs of the school, and the kind of president needed. They gather the Experience of the various parts of the school community through surveys and forums. They Reflect on how this data should influence their selection of candidates. They take Action by casting the net and selecting candidates for each round. And they Evaluate their progress toward the goal and make adjustments as necessary.

The same process can be used as a check at each stage. The committee chair, the person managing the process, and the committee members themselves should ask key questions at each juncture in the process. Do we adequately understand the Context of this decision? Have we paid attention to our own Experience and the ways it may influence us for good or ill? Are we taking time to Reflect on the implications of the decision in light of that context and experience? Are we willing to take Action, and not get bogged down by the uncertainty which will never be entirely eradicated? Are we honestly and courageously Evaluating our own methods?

The point here is not to reduce the discernment process to a set of steps, nor to weigh it down with an artificial application of the IPP. The IPP is just a lens the committee can use to look at its own process, and prompt it to make adjustments if something important is being missed.

Perhaps the most important step of the IPP for discernment is Reflection. It is also the least defined and so can get lost in the drive to reach a result. At one school, a Jesuit rector served on the committee and was a great resource for incorporating Ignatian discernment in their process. When the committee got to the final three candidates he had the members of the search committee reflect for a few minutes in silence and write down on a piece of paper the names of the three finalists in their order of preference. Then they went around the room and each member explained their ranking. They weren’t allowed to change their ranking at that point based on what others said, but only to present their original thoughts. This insured against people letting go too easily of their own perceptions or moving toward a final decision before the conversation was finished. After everyone had shared, he asked them to take a few minutes for prayer and silent reflection, and then they were asked to write down their order again. They went around and shared again, had another time of silence and wrote their final choice on a piece of paper. Before that final vote everyone was asked if they were willing to trust that, however the vote turned out, this is what
God wanted for the school. The chair of the committee and one other person counted the votes and shared the results with the committee. In this case some of the committee members were surprised by the result, but they stuck together and supported the decision as it was brought forward from the committee.

This is just an example of how to build prayer, silent reflection and open conversation into the process, and slow down the rush to a conclusion. Another example, from Loyola Blakefield’s search, can be found in Appendix W. As a result of this approach, people don’t leave feeling they didn’t get a chance to be heard, or that something will surface later which they didn’t have time to recognize in their own thoughts. It doesn’t assure consensus in the sense of everyone agreeing that the choice was the one they would make. There may even be a feeling for some of what Ignatius calls “desolation” about the decision and its implications for the school. But hopefully all will believe that the process was fair, took all viewpoints into consideration, and gave the Holy Spirit the opportunity needed to guide the school according to God’s will.

**Using a consultant.**

In the JSEA Study, half the schools hired search firms to conduct the process, ten percent used some services from a consultant and the rest executed the process on their own. Whether to use a search firm or not will depend on the circumstances of each individual school. Certainly one factor is cost. Search consultation could cost anywhere from $25,000 to $60,000, depending on the level of service sought, the cost structure of the consulting firm, and what the school is able to negotiate. Some firms adjust their fees for smaller schools or schools with a lower profile economic base. Such an expenditure would need to be looked at as an investment for the school, which would need to be assured of an appropriate return on that investment.

Among schools that decide not to use a search consultant, the common reason is that they felt there was nothing appreciable that the consultant could add to the process. This may be the case where a school believes strongly that it will limit its candidate pool to Jesuits. As the JSEA Study indicates, this is a vanishing probability.

The three most important assets search consultants bring are 1) a ready-to-go, tested process that can begin quickly and be executed efficiently, 2) a network or pool of potential candidates and 3) an objective and experienced third party. Regarding the first, it can be extremely costly if a search is delayed trying to build consensus around the process to be used and recruiting volunteers to execute its operational elements. If such a delay pushes the school out of the optimal “season” for president recruitment (from May to November), the impact can be compounded. In addition, if the school does not hire a firm, it will need to dedicate someone to provide extensive clerical support to the search chair, who even with such help will have to dedicate substantial time to managing the process.

Regarding the second asset, a pool of candidates, this requires a closer look. It’s not enough to have a database with many names on it; some of them have to be realistic candidates for the presidency of a Jesuit school. The pool of candidates for independent schools is relatively large, but most of these would
have little familiarity with, let alone commitment to, the unique charism of Jesuit schools, something we have already identified as a non-negotiable. On the other hand, there may be some people who have Jesuit school experience in their background that we wouldn’t have been aware of without tapping into the consultant’s network. The question is what kind of pool the consultant has access to, what he or she knows about the individuals in that pool, and how well the consultant understands your school.

The other benefits a consultant may bring include: additional credibility for the process among candidates and the school community; a third party contact for candidates who are concerned about confidentiality and getting unbiased answers to questions; an ability to assist with issues like governance or strategic planning that may need to be addressed in conjunction with the search process; or skills in resolving conflicts, conducting group process and navigating political issues. Not every firm will have the same levels of skill in these areas, but they are worth considering.

If a school decides that it would benefit from having search counsel, the next question is how to select a firm. The traditional approach is to prepare a Request for Proposal (RFP). Most consultants will warn against preparing a highly detailed RFP, the kind often required by large corporations or government agencies in an attempt to assure fairness and objectivity. First of all, these can be time-consuming for firms to complete and some may simply choose not to respond. Secondly, they are ineffective at uncovering the unique strengths and weaknesses of the prospective firms. Rather the school should consider sending a Request for Information (RFI) to a group of 3-6 firms. It should be fairly simple, giving background about the school, including any challenges the school is facing, so the consultant can prepare to address them. Articulating those challenges will also help the school know what it needs in a consultant. Ask for basic information about the firm, including some of their standard materials discussing their philosophy, methods and capabilities. An outline for an RFI for search consulting services can be found in Appendix H, and a list, contact information and brief descriptions of the firms who assisted Jesuit schools during the three year period studied, can be found in Appendix G.

Based on the response to the RFI, the school can select two or three firms they want to follow up with, asking questions specific to their observations about each firm and its claims. The search firms want a chance to talk to you and explain what they do and how they do it. Of course they are proficient salespeople (which is after all one of the skills you need from them) so you have to have a clear idea of what you’re looking for, and what’s important to your school. You have to ask probing questions that get at the firms’ strengths and weaknesses.

Most of the firms listed in Appendix G are small and the person to talk to before you hire will probably also be working on your engagement. But be careful, because consulting firms like to think that anyone from their firm can do the job. The committee doesn’t want them to assign someone that it hasn’t determined beforehand will be a good match for the school. To do this will require that the committee meet the consultants it is considering in person. The process is analogous to what the committee will be doing in selecting candidates for president. In both cases, the match is important.
If the school decides to hire a consultant to assist with its search, the next challenge is to work with them in a way that will maximize the school’s investment. During the JSEA Study, we not only asked participant schools about this, but we asked the consultant what advice they would give to get maximum benefit from the search firm. Here are the most common responses:

- **Trust the search firm.** You’ve made a big investment; let them earn their pay. The corollary to this is don’t hire the firm if you don’t trust them.

- **Take advantage of their objectivity** and third party status to sell the school to potential candidates. Also use their experience with other schools and relative objectivity to shine a light for you on difficult issues and to help sort out conflicts.

- **Make sure the search committee is ready to be partners** with the firm and do their part. As the NAIS Head Search Handbook says, “Your search consultant must serve as an adviser—not a crutch. If your committee is weak or inexperienced, it can be tempting to delegate so many of the decisions that the search begins to take on the character of the consultant instead of the school.” At the end of the day, the search committee must be able to make its own decisions on behalf of the school. Consultants will tell you that attendance of members is key. Unlike other types of committees, when search committee members miss meetings they can distort the process.

- **Don’t hide challenges and issues from the consultant.** They can help you with these if they know about them. If they don’t, they can embarrass the school and themselves. Along the same vein, don’t have hidden agendas, either as a committee or as individual members. Be as transparent as possible with consultants so that they can apply their skills to the specific needs of your school.

- **Choose a search committee chair who will be able to spend time with the consultant** and oversee their involvement. The committee as a whole has this responsibility, but one person needs to take the point on this and make sure the process is disciplined.

**Setting up the search committee.**

In the JSEA Study of Presidential Transitions, only two schools did not set up search committees, and that was because they didn’t conduct searches. In one case the president was appointed by the Provincial and in the other an emergency interim was pulled in and later named as permanent. In all other cases, the schools saw fit to appoint a search committee. The search committee is generally appointed by the board to act on its behalf to find a suitable candidate or candidates. Even when the board doesn’t have the final say in the naming of the president, it almost always impanels and charges the search committee. The only alternative to this is for the board to conduct the search itself, and given the amount of time it takes to conduct a search and the volume of other issues a board has to deal with, this would shortchange either the search or the governance of the school. So it would be understating the case to say setting up a search committee is a best practice. In a true search, it is the only practice. The following are specific considerations in setting up the search committee:

**Timing.** Some argue that the search committee be impaneled after the search consultant has been chosen. It is possible to do this when there is enough time to impanel a separate transition planning committee which can select the consultant and work with that consultant in selecting the committee. The advantage
of this approach is that the search consultant can give advice on the make-up and charge of the committee. The search committee also doesn’t have to add to its already considerable task the hiring of the consultant. The danger is that the search committee won’t have chosen its own consultant, won’t have had the opportunity to get to know the consultant during the selection process, and therefore may feel less committed to their approach. It also can delay the process as now two committees have to be impaneled and ramped up. In most cases, it’s important for the committee to have as much time to know each other and the consultant as possible.

Selecting the search committee chair. David Thomas, in the NAIS Head Search Handbook, argues that the search committee chair should be the board chair or chair elect. It is true that there needs to be a good working relationship between the two chairs, but in many cases it will simply not be possible for one person to fulfill the demands of both. The chair elect is an ideal person, because it sets up a bonding for their working relationship as the new president begins the job. But in many cases this may not be practical either. It is critical that the chair be a current member of the board and be someone with both experience on the board and the high regard of his or her board colleagues. These characteristics all serve to give the search process the trust and ownership of the board. It is also important that the search chair have at least two years remaining on the board so that should any doubts arise later and lead to second-guessing, someone can remember why the president was chosen.

Selecting the search committee. Most search chairs and consultants recommend that a search committee be no smaller than seven members and no more than twelve. Both diversity of perspectives and unity of process are important. Diversity can refer to gender, ethnicity, age, and economic status, but it can also refer to people who bring different thinking and perceiving styles. All these provide a parallax that allows the committee to get a truer read of the candidates and the school’s needs. Unity is important because all members have to commit to the process. As opposed to uniformity, which is the antithesis of diversity, unity means that the committee is able to act in concert. As the committee gets below eight members, it is difficult to provide for a diversity of perspectives. As it get above ten, the group becomes unwieldy and the integrity of the process is difficult to maintain.

One person to consider having on the committee for a variety of reasons is a representative of the local Provincial, often the Provincial Assistant for Secondary Education (PASE). This person will be a great asset in understanding the charism of Jesuit education, the mission of the Society of Jesus of which it is a part, and the application of discernment grounded in Ignatian spirituality. He or she will also be able to explain the best ways to work with the province and other provinces concerning possible Jesuit candidates. Finally the PASE will be a channel of communication to the Provincial so that at the end of the process, when the committee has proposed its candidate, and the board is ready to hire that person, the Provincial will be ready to concur and mission him or her as the Director of the Work. In some cases, the PASE will prefer not to serve on the committee but to provide these services in a liaison role, which can be just as effective.

There are various opinions about including on the committee teachers, staff or administration, who would thereby be helping select their direct or indirect boss. Jesuit schools have had both good and bad
experiences with this. Much of it depends on the culture of the school and how accustomed employees are to stepping into such roles and letting go of personal or subgroup interests in favor of the overall school’s interests. Some schools do this regularly and their employees are capable of making that shift in perspective. Where that is the case, they bring valuable perspectives and insights. They also build credibility and ownership for the decision once it has been made. In some schools an adversarial culture has built up which makes this difficult to do. This question is germane not just for employees. The same ability to transcend personal or subgroup interests must be considered even if the prospective committee member is a parent or an alumnus.

Beyond these considerations, members of the search committee should be people who are knowledgeable about the school, committed to its mission, thoughtful and good at collaborating with others. It helps to have people of stature whose involvement brings credibility to the process. Sometimes such people are also busy people and the board may be tempted to appoint them for their name’s sake, without their being able to commit to all the meetings. Unlike other kinds of committees, this doesn’t work well for search committees. When members miss meetings it distorts the group discernment because not everyone shares the same experiences of important components of the process. If someone finds they are not able to make all the meetings, they should be willing to resign from the committee. If the board thinks this may be a potential issue with some committee members, it may want to set the committee size to accommodate some attrition.

Both the chair and the committee should be appointed by a vote of the whole board, but a slate should be presented by the board chair, executive committee or a transition planning committee if there is one, after having invited board members to suggest names. This makes sure the board has ownership of the results while impaneling a group that has been chosen according to the criteria described above using a systematic process.

With the search committee impaneled, the other major responsibility of the board is to charge the committee with its task. This may include some parameters for eligible candidates, some school goals or needs it wants the committee to take into account, or some general parameters for the process. It may also include a time-frame they want the committee to work within and a budget available for the task. It should clarify who needs to be involved in the process (e.g. the Provincial, or a Jesuit board of owners). The most important element of the charge, however, is clarifying the sort of recommendation the board expects to receive back from the committee. Does it want two or three candidates ranked by the committee, leaving the board the option of changing the ranking? Do they want two or three unranked candidates, leaving to the board the responsibility of choosing one? Or do they want the committee to choose one candidate, leaving the board to decide whether it feels it needs to countermand or remand the committee’s work? The argument for the first two options is that this is the most important decision the board will make and it can’t delegate that responsibility to another body. The argument for the third is that if the board makes the final selection, it will do so with less time, less competence and less data than the search committee had. The board is better equipped to audit and verify the work of the committee than to re-do it. Nevertheless, however the board decides it wants the final decision made, this must be communicated clearly when the committee begins its work.
In some Jesuit schools, there are two boards, a governance board made up primarily of lay members, and an ownership board, made up Jesuits. In these cases, the school’s by-laws might prescribe roles for both boards in the selection process, and the role of the Provincial as well. In such cases, it should be made clear exactly what the process will be for making the final decision, to whom the committee’s recommendation will go, and what form it should take.

**Involving the school community.** Non-profits differ from for-profit organizations in how leaders are chosen. In a for-profit enterprise, the CEO is chosen by the owners, either a single owner, a few owners of a partnership or closely held corporation, or a board representing shareholders of a publicly held corporation. Non-profits must also have the owners hire the president. But who are the owners? They are a broad group of stakeholders: donors who have given money to sustain the organization; employees who often work at below market wages or give of themselves beyond their paycheck; parents who donate and volunteer above the level of tuition; even the general public which forgoes tax revenues to support the organization’s charitable purpose. The board represents all these stakeholders and ultimately makes the hiring decision on their behalf. Shareholders in a for-profit have pretty clear expectations—return on investment. For stakeholders in a non-profit, the expectations are many and varied. So for an important decision like hiring the president, it behooves the school to spend some time learning the expectations of these stakeholders. Part of this comes from the value the Jesuits place on collaboration and consultation with those served by their ministries. But part of it is self-preservation. People don’t have to make the sacrifices they do to support a Jesuit school. They do so voluntarily in the face of many other demands for their time and money. If the school seems not to value their input, they will be less motivated to give it anything else.

The search committee is itself a first step toward involving the broad group of stakeholders, by the way its membership reflects the community served by the school. But that involvement must extend outward to the broader community in palpable ways. One of the search committee’s most important tasks is to gather input from this community. The goal is both to use their input to get a more complete picture of the school and its needs, as well as to build their loyalty to the school and the new president. There are several opportunities in the process for extending this outreach.

The first opportunity comes with the way the departure of the incumbent is announced. Appendix C gives an example of an announcement of resignation. Then comes communication about the formation of the search committee and the process to select the next president (Appendix I). The committee can use surveys (Appendix O) and forums (Appendix P) to gather perceptions about desires for the school, its strengths, needs and challenges, and what people think it needs in its next president. Some schools will also use advisory committees to extend their reach and represent the various constituencies. After the initial data gathering phase, the committee enters a quieter phase in which it is analyzing and reflecting on the data, and beginning to seek and identify candidates who often desire confidentiality at this stage in consideration of their current employers. But once 5-8 semi-finalists are identified the process shifts back in a more public direction. When 2-3 finalists are selected, the committee begins to reach out to various groups—administrators, faculty, parents, alumni and students—to see how the candidates interact with
them and allow the candidates to get to know the school better through them. When a selection is made, it needs to be communicated to the school community in a way that gives them confidence and invites them to embrace their new president. Once hired, the president should honor his or her new constituents by connecting in person with as many of them as he or she can, as soon as he or she can. This is done strategically to make best use of the new president’s limited time. And finally an appropriate ceremony, often at the school’s Mass of the Holy Spirit can be held to celebrate the new leader with the various sectors of the community, from the Provincial and local bishop to the parents, alumni and students, to the neighbors and local school and civic leaders.

During the course of the process, it is especially important for the search chair or someone on the committee to keep the rest of the administrative team informed. They have the most at stake, and the sitting president often won’t be in the best position to keep them informed. In those cases where it wouldn’t be appropriate for the current president to channel information to the rest of the administration, faculty and staff, it might be appropriate for the chair to meet with the principal every couple weeks and have the principal keep the others informed. Once or twice during the process it would be helpful for the search chair to come to an administrative team meeting and to a faculty meeting as well. Not only will this allay anxieties and adventitious assumptions about the process, but it’s a great opportunity for the employees to come into direct contact with the governance structure of the school. Such experiences help build the bank of trust that will serve the school well beyond the search process.

More information about processes for gathering broader input can be found in the Appendices previously cited, as well as the NAIS Head Search Handbook. Search firms will also have tested methods for gathering this input and building support throughout the process.

**Finding candidates.**

The overriding concern when a committee begins the search process is whether they will turn up enough qualified candidates. Most of us are confident that we can assess the relative merits of the candidates once we have them. But how do we make sure those who would be the best fit know about the opening and apply?

In Jesuit schools, this issue is complicated because there are two categories of candidates and the process for each is different. Most Jesuit schools begin a search hoping that they can hire an actual Jesuit. While over the last decade there has been a sea-change in Jesuit schools’ openness to lay presidents, most would still say that, all other characteristics being equal, a Jesuit president would be a tremendous asset to the school. Some would say they would consider a lay candidate only if a qualified Jesuit could not be found.

**Finding Jesuit candidates.** As discussed earlier, most search committees will ask the question early on whether there are any Jesuit candidates available. As discussed earlier, under *Relationship with the Society of Jesus*, the school will need the help of the Provincial or his Provincial Assistant for Secondary Education (PASE). They can be helpful in identifying Jesuits who might be available, and suitable, within the province, and can help to approach other provinces as well. They will not only be helpful;
most Provincials will require that the school have the Provincial’s permission before even approaching a prospective Jesuit candidate. It’s important that search committees factor this into their efforts at the beginning of their work, and is a good reason for contacting the PASE early on to determine what role he/she will play in the process. It’s also helpful for the committee to understand why Provincials want Jesuit candidacy to be handled this way. Appendix F suggests a set of questions to discuss during the initial meeting with the PASE.

As a consequence of their vow of obedience, Jesuits don’t unilaterally decide where they are going to work, but rather entrust that decision to the Provincial, who takes into account the discernment and desires of the Jesuit, but makes the final decision about missioning. Requiring that schools work with them or their PASE before contacting any individual Jesuits about the position better supports the openness needed for true discernment. If the committee contacts a Jesuit first and is successful in motivating him to desire or seek the job, it can complicate and cloud the Jesuit’s own reflection and the conversation he must have with the Provincial. The ideal state for such a decision is to be in balance (sometimes referred to as “Ignatian indifference”), that leaves both free to give equal consideration to all possibilities. With Jesuit ministries expanding and Jesuit numbers shrinking, Provincials have a complicated and often delicate task assigning men, so it behooves the committee to be sensitive to this.

All this having been said, it should be noted that the Jesuit landscape of North America is in the midst of significant change. The American “Assistancy” as it is called is in the process of combining provinces going from ten to four in the US and two to one in Canada. Additionally, many Jesuit apostolates and activities which were once governed at the province level, are now managed on a national scale. More and more, men are being missioned to assignments beyond their own province. This is good news to schools in terms of the pool of Jesuit candidates, but it also means more competition for those candidates. And it becomes even more complicated for search committees to know whom to talk to and how to promote the opening among Jesuits. In this environment, the JSEA is being looked to for more leadership on a national level, and is trying to explore how it can assist as a communications node and a clearinghouse.

The bottom line is that the best practice for finding Jesuit candidates is to communicate that desire as soon as possible to the PASE, including the PASE on the search committee if possible. This will provide clarity about whether there will be any Jesuit candidates and who they might be before the search committee starts narrowing down the lay candidates.

**Finding lay candidates.** As far as finding lay candidates, the process for promoting the opening is similar to what any school would do. The following is a summary of the process used by most search firms, which they are generally willing to execute on the school’s behalf with the assistance of the search committee. The NAIS Head Search Handbook will also provide additional details.

After the school has developed a job description and marketing materials based on that job description (see Appendix J), and a profile of the school’s history, vision, assets and challenges (see Appendix M), it should post a notice of the opening in appropriate forums. A list of national venues for posting appears in
Appendix K and a sample ad is given in Appendix L. Despite the fact that most Jesuit schools want a president with meaningful experience in Jesuit education, they must be prepared to receive many resumes (maybe most) from people who just want to be the head of a quality private school. This wide-cast net will find a few fish that may not be swimming in Jesuit waters currently but have before, so is worthwhile. But much of the effort must be targeted outreach to current presidents and principals in Jesuit schools, leaders at Jesuit colleges, and other leaders in Catholic education. These will generally be letters and emails briefly describing the school and the position and asking the recipient to suggest or pass the information along to any qualified candidates. Of course, the recipient himself or herself might be a potential candidate. In some cases it may be appropriate for the letter to ask them to consider applying. In other cases it will be better, so as not to appear to be “cannibalizing” other schools, to be oblique and let recipients come to their own conclusions about whether they are prospective candidates. The important point is that they should all be included in the mailing.

**Internal candidates in the pool.** Since we are discussing where to find candidates, a word needs to be said about internal candidates. In general, an internal candidate—most often a principal, but sometimes a development director, finance director or some other administrator—will have the advantage of knowing the school well and offering continuity of vision and approach. The flip side of this is that the school may need new ideas and approaches that the internal candidate is less likely to bring to the position. Generally, however, the school wants someone who is not so far outside the Jesuit culture that they would put the Jesuit charism at risk. So it’s a positive to have qualified internal candidates available for consideration, and a good reflection on how the school develops its employees. Like all the other candidates, internal candidates will have plusses and minuses, and must be considered on their merits.

The challenge of evaluating internal candidates is the difficulty of putting their candidacy on the same footing as the others. On one hand the person has had the opportunity to show his or her skills in ways that the committee can only guess about for others. They may have built significant personal capital and there may be a feeling in the community and among committee members that the school owes them a promotion. On the other hand, people may have difficulty envisioning them in a role different from what they have played hitherto. They may also have stepped on a few toes, just doing what they were supposed to do, and those toes may still be smarting. With external applicants the committee has seen them only as presidential candidates and so they seem to fit the part from the beginning, and they haven’t done anything up till now to upset anyone on the committee. The challenge here is not that the internal candidate has a clear advantage or disadvantage, but that it can be difficult for the committee to be objective. It’s important that members acknowledge within themselves and in open committee discussions where biases can influence their viewpoint in this situation. The committee must sail between the Scylla of discounting a qualified internal candidate, and the Charybdis of their candidacy preempting an authentic consideration of all the school’s options. How the internal candidate is handled during the selection phase will be discussed more in the next section.

**Diversity in the pool.** Diversity is another important issue to consider during the building of the candidate pool. Most Jesuit schools place a high value on diversity in their hiring, but often encounter difficulty in generating a diverse pool of applicants. In the JSEA Study, search committees generally did
not know the non-job-related characteristics of the candidates they didn’t personally interview. However, most search chairs felt that the applicants were overwhelmingly white males between the ages of 45 and 60. There is a sense that this is inevitable. Our schools, even the ones that are now co-ed, have a history of being all-male; with some exceptions, they tend to serve an upper middle class clientele; they are Catholic and have traditionally served Catholic, European immigrant populations. So we don’t have to be intentionally exclusionary to end up with fairly narrow pools. As one Jesuit diversity director said recently, just saying “women and minorities encouraged to apply,” isn’t going to change that either. If the school hasn’t challenged itself to step outside its normal channels, if it hasn’t brought minorities onto its boards and committees, including the search committee, if the committee itself doesn’t take time to make personal contact to assure minorities that their candidacy will be considered seriously, if it uses only traditional methods of outreach, it shouldn’t be surprised that it sees only traditional candidates.

Selecting the candidates.

For most Jesuit schools, and private schools in general, there has been a fairly common process for narrowing down the applications received to a final candidate. It begins with receiving resumes and cover letters from those interested, based on which an initial pool of viable candidates is selected, often 15-20 in number. If a search firm has been engaged, the consultant may interview and gather additional information from all those in this pool. If the school is managing its own search, committee members may conduct those interviews, or ask the candidates to submit written application materials, including one to three essay questions, a completed application form and a list or letters of reference. Based on this information the search committee will then select 5 to 8 candidates as semi-finalists. All the semi-finalists will be interviewed by the search committee. The committee may check some references at this point, and if it has a search consultant, the consultant will likely have done some of this already. Based on this information, the committee will then select 2-3 finalists, who will visit the school for one to two days each, being interviewed more extensively by the committee and meeting with various constituencies, including the board, to allow for community input and for the candidates to get a better feel for the school. After receiving back reports or having made its own observations, and conducting more thorough background and reference checks, the committee selects one candidate that it is willing to present to the board. It may begin salary negotiations before presenting the candidate to the board, or if it feels confident that the compensation package will be accepted by the candidate, secure the board’s approval first. Hopefully the Provincial will have been kept apprised and will have indicated that there will be no objection to missioning the candidate as the Director of the Work. But this formal approval must be secured before offering a contract.

There are variations on this trajectory but it represents a well-accepted process for selecting a new president. A more complete description of the normal steps of this process and detailed steps can be found in the NAIS Head Search Handbook, and a pro-forma checklist prepared by JSEA is available in Appendix A. We want to highlight several crucial points that the Jesuit school in specific should pay attention to.
Two hats: screening and marketing. One of the challenges of hiring a president is that the committee has to wear two hats at once. The first hat is marketing the school to the prospective candidates. The kind of candidate the committee wants probably has a number of options and it would be dangerous for it to sit back and assume that such candidates will find their way through a maze of requirements and obstacles. On the other hand, the committee must approach candidates with a healthy skepticism in order to find out the truth about them. Consider that the candidates must do the same. They have to market themselves to the school and they have to be assessing carefully whether it will be a good place for them to spend perhaps the rest of their working life. It helps for us to remember what it’s like to be a job candidate. Even for blue chip candidates it can be a desperate moment in their lives. It is like being on a ledge and having to jump across a chasm of the unknown to another ledge. For candidates who don’t currently have a job or for whom the current position has become tenuous, they will be desperate to land in another. If they have a job and it’s going well for them, considering a different job will feel like a risk. The committee would do well to be as encouraging as they can be on one hand, but also accept that the candidate is under great pressure to magnify his or her experience and skills to convince the committee. Thus, a candidate who was principal during his school’s capital campaign and sat on the steering committee, becomes someone who helped lead the school’s successful $50 million capital campaign. The committee needs to assay these claims without the candidate feeling mistrusted.

Resumes vs. application forms. The first place to exercise healthy skepticism is in reading resumes. The committee members must recognize that resumes are marketing pieces. There’s nothing wrong with that. In fact, the committee needs to know how well candidates can market themselves, because that’s an important skill for a president. But it may want to also have candidates being considered as semi-finalists complete application forms. Where resumes include only the information the candidate wants the committee to see, application forms allow the committee to ask for the information it wants, in a format that it wants. For instance an application form should ask for candidates’ complete work history, who their employers were, the years they worked at each, with gaps explained, the names of their supervisors and their annual salary. It should ask for the candidates’ education history and degree earned, with dates and granting institution clearly spelled out. One would think that all this information is already in the resume, but it will be there only if the candidate finds it advantageous. Some may be afraid that a candidate for this level of position will be offended to have to complete an application form and attest to this information with their signature. As long as the committee communicates its excitement about the candidate and its desire to know as much as possible about them, qualified candidates will see this as an opportunity to advantage their candidacy.

The application form also functions as a legal document in a way the resume does not. Some personnel professionals advise employers not to retain resumes because they may contain non-job-related information that can open them to liability. But application forms can be a good way to establish and verify basic information. For instance, by signing the application the school can have the candidate agree to the personal behavior clause from its personnel handbook. We may assume that any reasonable candidate would understand the behavior expected of the head of a Catholic school, but there is a surprising amount of confusion about this, and it often feels too delicate to bring up in the interview process. Rather than trust to assumptions, having it on the application form addresses the issue and
surfaces any questions the candidate may have early in the process. Similarly, the application form can confirm the candidate’s permission to conduct a background search, and secure their permission to contact anyone but those explicitly excluded by them for a reference.

A sample application form is included in Appendix Q. Please note, however, that because JSEA is not qualified to give legal advice, and law in this area is evolving and may vary from state to state, each school should work with its own legal counsel to develop an appropriate application form.

**What candidates want.** Putting on its marketing hat for a moment, the committee should think about what the process looks like from the candidates’ perspective, and what they would find helpful.

First of all the candidates will be concerned, at least in the early stages, about the confidentiality of the process. Most are likely to be in positions of responsibility at other schools or organizations and how they introduce the prospect of their seeking other employment to their superiors, colleagues and communities will be a delicate process. Many good candidates won’t even consider throwing their hat in the ring unless they can keep it private until their candidacy reaches a fairly high level of probability. They may even desire that they only be considered as finalists or even the only candidate. While in some cases a candidate may be worthy of such consideration and have valid reasons for it, generally the search committee is committed to a more inclusive approach because of the school community’s expectation or the process they have already put in motion. The committee will have to decide whether and how to adjust its process if such a candidate surfaces, but it would be well-advised to maintain and promise strict confidentiality up to, and if possible through, the semi-finalist stage.

Candidates want to be kept informed about the process. They are anxious about timelines because they don’t want to miss any deadlines but they also don’t want to read something negative into unexpected periods of silence from the committee. It helps to be reassured that their candidacy is still being considered, assuming that it is. They want feedback on how they are doing, and the ability to ask questions about the process, the school and the importance of information they can provide. They want to know what the school is really like, what its challenges are, hidden issues they might encounter if they were president. They want to know what criteria the committee will be using to evaluate their candidacy. The committee will be able to meet some of these expectations, but it also may encounter constraints in providing the information sought by the candidate. The key is not to let candidates go too long without being communicated with by the school. In such periods of silence they will formulate their own explanations of what is happening, and these can be unnecessarily pessimistic. Long silences may even lead to a candidate pulling back their candidacy or accepting another offer. One of the advantages of engaging a consultant is that staying in touch with the candidates is generally considered part of their role, and they have the advantage of objectivity, which candidates find comforting. If a search consultant has not been engaged, the committee should consider assigning a committee member to each of its candidates starting with the semi-finalist stage to check-in with them and encourage them through the process. If a committee does have a consultant it should still consider having some person in addition to the consultant, often the chair, provide direct contact from the committee at significant points during the process.
A key place to be conscious of the balance between healthy skepticism and marketing to the candidates is during the interviews. This is an important time of communication between the school and its potential next president. Some committee members might slip into the role of judge and project a stern, no-nonsense demeanor that can put the candidate on the defensive. They can leave candidates with the impression that the school is stand-offish and not very excited about what they have to offer. Others may seem anxious not to offend the candidate or surface any negative information. This can give the impression that the school is begging for a leader and may not be attractive on its own merits. Search committee members should approach the interviews with the attitude that they are excited about the candidate’s potential and want to learn everything they can about him or her. When this is communicated to the candidates the committee comes across as neither disapproving nor diffident.

Selection as the first stage of orientation. The committee should also keep in mind that during the interviews and throughout the process, communications with the candidates are not only for selection purposes, but also form the first stage of the eventual selectee’s employee orientation. The knowledge that the next president of the school will use in leading the school, he or she begins to acquire here. All the values the school holds as central to its own charism, and that it seeks in a leader—generosity, thoughtfulness, prayer, discernment, listening, trust, courage, professionalism—should be modeled during the committee’s interactions with the candidate. There is no more opportune moment for the school’s next leader to experience the authenticity of those qualities to the school, and to begin, or continue, to develop those qualities in himself or herself. It is entirely appropriate for a Jesuit school search committee to begin its meetings with a prayer, to pray for the candidates, and to begin an interview by praying with and for the candidate or at least telling him or her that the committee has prayed that the Holy Spirit will be helping them during their interview. Those candidates who understand and embrace the Jesuit charism will find this encouraging.

Jesuit candidates in the semi-finalist stage. We discussed earlier the process of reaching out to Jesuit candidates. We pointed out that this should be done early on and that the process is different in some ways from that for lay candidates because of the discernment process Jesuits use to make decisions about assignments and the Provincial’s role. It is possible that the committee’s efforts will result in a clear Jesuit candidate emerging and they may not continue further with their search. In most cases, however, the committee will want to be able to consider the relative merits of both lay and Jesuit candidates together. How this is perceived by the Jesuit candidate is evolving. It used to be that Jesuits were reluctant to put themselves in competition with lay people. On one hand, if they prevail, it may feel contrary to the spirit of collaboration with the laity which is at the center of the Jesuit mission. On the other hand, if they aren’t chosen it can be disconcerting for the Jesuit in a way that the lay candidate would not experience. There is fear of rejection for any candidate, but for a Jesuit to risk being turned down by one of “our own” schools might feel like a challenge to one’s identity. But Jesuits are being better prepared for such give-and-take through their formation process. The Society is identifying characteristics of leadership that they need to develop “just like any other leader,” so it would be less personally challenging to have a search committee examine their candidacy on those very criteria. Still, committees should be sensitive to the particular challenges a Jesuit candidate would have in putting forth his candidacy.
Generally, it would be most appropriate to include the Jesuit candidates on an equal footing with the lay candidates by the semi-finalist stage. Some committees may wait until the finalist stage, having the lay candidates go through the semi-finalist interviews to see who will be considered as a finalist with a Jesuit candidate. This is done to spare the Jesuit the preliminary give-and-take and underscores the premium the school gives to a Jesuit president. However, this risks sending a wrong message to both the Jesuit and lay candidates about their different status. While everyone would acknowledge the value a Jesuit brings to school leadership, Jesuits shouldn’t get the message that this is the only characteristic the school desires of them. And experienced, talented and committed lay people should not get the message that the search process is just going through the motions, and their candidacy is not being taken seriously or is viewed as a back-up plan. If both Jesuit and lay candidates are being considered, it is better to include Jesuits on an equal footing with the lay candidates by the semi-finalist stage, and as suggested earlier reach out and communicate clearly how much the committee values the candidacy of each, giving them ample opportunity to ask any question or raise any concerns they have.

**Internal candidates in the semifinalist stage.** Similarly, the committee should think through how it wants to handle internal candidates. Some schools will hold internal candidates out of the process until the late stages, say, the finalist stage. They can even wait till after the finalists have been considered to decide whether they want to turn instead to an internal candidate. As with Jesuit candidates, there is sometimes a concern that the internal candidate feels an extra measure of vulnerability having to compete for a job in his or her own school. If this person is not chosen, they may feel rejected by the process, their morale be undercut and they may end up leaving the school. In fact, consultants tell us that the unsuccessful internal candidate will almost always end up leaving the school within three years, even when they tell the committee and themselves that they will stay even if not chosen. It stands to reason because not only will this person not be able to finally run things the way they want to, but they can’t even count on things being run the way they’re used to.

As far as how to include them in the process, by keeping them out of the process early on, if the external candidates are clearly stronger, the committee spares the feelings of the internal candidate. As with the Jesuits, there is a risk of sending the wrong message, however. The internal candidate can feel either that he or she is a shoo-in and can bypass the scrutiny others may face, or that he or she is not being taken seriously. External candidates can question the authenticity of the process, and that they are the victims of a hidden agenda. In most cases it will be better to include the internal candidate in all stages of the process, but the search consultant or committee chair, or both, should be in communication with this candidate, as they are with all candidates, to explain why things are being done this way, to answer any questions or concerns and to consider adaptations as necessary. For instance, external candidates will be given a tour of the school, perhaps with their spouses. The internal candidate doesn’t need this, but their spouse might still appreciate it. Or perhaps this becomes an opportunity for the internal candidate to give a tour and talk about his or her work around the school or vision for the future. Skipping steps always exposes a process to risk, even when they seem obviated by circumstances. It is generally better to adapt the step to maintain the integrity of the process.
Non-traditional candidates. Most Jesuit schools are rooted in deep traditions, and yet by virtue of being Jesuit they value openness and diversity. It was mentioned earlier that Jesuit schools have to push themselves outside their normal spheres of operation if they want to attract non-traditional candidates, which for our schools would include women and minorities. The openness to making adjustments must continue throughout the selection process as well. Members of majorities have a tendency to think that all they need to do to give equal opportunity to minorities is to treat them the same. But it should already be clear from our discussion of Jesuit vs. lay candidates and internal vs. external candidates, that treating people the same doesn’t always lead to fairness or the best results. In areas of gender and ethnicity, those of us in the majority (and for Jesuit schools that generally means males and those of European descent) often are simply unaware of how things look to women and members of ethnic minorities. Where we might assume that candidates will feel free to ask candid questions about the school, non-traditional candidates may be concerned that their questions relating to race or gender, or even something like financial aid, will brand them as potential troublemakers. Committee members must challenge themselves to consider what the process, or a question, might look like from the candidate’s perspective and support efforts to reach out and meet the candidate where they are. They should also reflect honestly on their own biases and how they might influence them one way or another. This is important to do for any candidate, but our envelope will be pushed further if that candidate is not one we are used to working with in the Jesuit school setting.

Interviewing. A more complete treatment of the interviewing process, at both the semi-finalist and finalist stages can be found in other sources, including the NAIS Head Search Handbook, and a list of sample questions can be found in Appendix S. But we want to make a few notes that will help Jesuit school search specifically.

Spouses. For Jesuit schools, the concept of a married president is relatively new. Often the schools have come late to the realization that the current transition they are facing is the time they must first entertain the possibility of a married president. Independent schools have been dealing with this reality for years, and know that involving the spouse in the process is crucial. There are a number of expectations of a president’s spouse, both explicit and unvoiced, which schools who have only had unmarried presidents might not be aware of. The search committee would do well to discuss what they feel the school should expect and discuss these with the candidates to alert them to these expectations and understand how the candidate and candidate’s spouse feel about these.

The committee should also be prepared to address with the community unrealistic expectation they may have in order to support a healthy balance in the life of the “first couple.” What is or can be expected of a spouse is a grey area. It can’t be approached as items on a job description or evaluation criteria that a candidate or spouse can commit to in the same way the candidate commits to for himself or herself. But this is more a matter of conversation, of reaching an understanding, and the search committee and the candidate deciding if they are comfortable with those expectations.
Most schools will invite the spouse to come visit the school with the candidate, tour the campus, meet key players and participate in social activities. While these are not interview situations, spouses will be aware that the search committee will be observing their individual interaction and their interactions as a couple to assure themselves that their chemistry will be good for the school. Spouses need to be sold on the school as much as and maybe more than the candidates, because they are being asked to change their living situation, social circle, and perhaps job for the sake of their spouse and the school. Many schools connect the spouse with people who can help them explore job possibilities, real estate options and how to become part of the community. Some of this can take place during the visit, but it is helpful to have volunteers who can stay in touch with the spouse to answer questions. Jesuit schools are learning that they may have done a good job of evaluating and selling their top candidate only to find that the spouse has final veto power.

**Structuring the interviews.** There are two schools of thought about how interviews are structured. Most people believe that the interviews should be as consistent as possible between candidates for the sake of fairness and the ability to make valid comparisons. Some people think the questions should be identical for that reason. Others feel that to get at the unique strengths and weaknesses of the various candidates, the committee has to be free to ask questions specific to each. Most schools go with a combination, using a set of standard questions that all candidates will answer, but allowing for follow-up questions based on their answers and additional questions based on observations from their application materials. In order to make sure all questions are asked and in the same way, schools will generally have one person ask all the standard questions, or, to involve all committee members, assign each a question to ask. Follow-up questions can be asked as the interview progresses, as long as the chair manages the time to make sure all standard questions get asked. After all standard questions have been asked, committee members can ask about specific items from the application materials. Appendix T gives a framework for applying rubrics and rating the interviewees’ responses.

**Appropriate questions.** Jesuit school search committees will generally say that the most important attribute they are looking for is that ability to sustain the school’s Jesuit charism or tradition. Because this is unique to Jesuit schools, questions used by steering committee members in other searches they’ve participated in, and in many cases the questions developed by search consultants, will not bring this out. It is entirely appropriate to ask candidates about their spiritual life, about how they pray and about their relationship with God, or the Catholic Church. We have been so conditioned to consider such questions illegal (which in other hiring contexts they would be) or at the least, impolite, that we sometimes neglect having a forthright conversation about them. Yet these get at the most important attributes we are seeking. As stated earlier, we don’t want to make the candidate uncomfortable, but generally if someone is a bona fide candidate to lead a Jesuit school, he or she will welcome such questions. Their spirituality is likely to be more developed and more public than most of the committee members’. So it’s probably the committee’s lack of familiarity with spiritual topics that prevents it from asking these questions, rather than any objection it might receive from the candidates. Again, Appendix S includes some sample questions that the committee might want to include.
The candidate’s use of discernment. One of the areas crucial to a Jesuit school, yet difficult to explore, is how the candidate understands and practices discernment. The committee will want to know what the word discernment means to the candidates, and how they have actually practiced it or tried to practice it in their work to date. If there is an absence of understanding, or no apparent willingness to develop ways of making sure the Holy Spirit is listened to when decisions are made, the committee must wonder how the candidate will be able to foster this key element of the Jesuit way of proceeding. On the other hand, the committee should be prepared to find that there is latitude in how Ignatian discernment is understood and even more latitude in how it is practiced. And not every decision will require Ignatian discernment. Most decisions a president will make will not. The key is finding out whether the candidate has given thought to how leaders in a Jesuit school should make room for the Holy Spirit in important decisions that shape the life and direction of the school.

There is another issue related to discernment which the committee should consider as it begins its work. We discussed earlier how Jesuits discern their assignments and how different this is than the normal career growth trajectory that most of us pursue. The standard search process is built on the assumption that candidates are attracted to positions of leadership, that they will sell themselves vigorously and that the competitive assessment will sort out who the best candidate is. But many lay people working in Jesuit schools, including people who are potential presidents, are not thinking of a career trajectory. Like their Jesuit colleagues, they are passionate about their work in the school, see it as a vocation, and don’t have a driving ambition to earn a higher salary or achieve higher status. When such a person decides that the Holy Spirit may want them to apply for an open presidency, they will, like their Jesuit models, try to be as “indifferent” as possible, in the sense of being open to whatever God’s will is. It’s not easy to know God’s will for certain, so this may leave such a person in what looks like an indecisive state. Such a person may be an excellent candidate for the presidency of a Jesuit school, but if search committee members are experienced only with “normal” searches, this person may seem indecisive and even ambivalent about the position. The committee will want candidates who are strongly motivated to be president, who have a vision for running a school and who are comfortable exercising leadership—and rightly so. But they have to be careful how they interpret some statements from a “discerning” candidate that may sound like a lack of confidence or misgivings about the job. An example might be the candidate who says he doesn’t assume he is the best person for the job and is praying that the committee will be guided to select the one who is, even if it isn’t him. Or a candidate who is clearly looking for more information in the course of the process to confirm for herself whether she is called to the role. The committee must keep in mind that the person it is looking for will likely give some responses that wouldn’t be expected in a different context, but might be appropriate in the context of a Jesuit school.

Demonstrations. There are basically three ways to find out if someone can do a job. We can ask them to tell us themselves how they do things, we can ask others who know them about them or we can observe them in action. These are like three legs of a stool, and like a stool, the search process is reliable to the extent that it incorporates all three. We’ve discussed the first leg as we have talked about the interview process, and we will discuss the second leg next, when we discuss reference checking. The third leg, observing candidates in action, as helpful as it is, presents a challenge. It’s difficult and can be awkward to go visit and observe someone at their current place of employment. Often issues of confidentiality and
the anxiety over the potential loss of a colleague prevents this. But some search committees have done this. One search chair for a school that was looking only at Jesuit candidates traveled to where each was currently assigned and watched them say mass.

Unlike candidates for a teaching position, it’s difficult to set up a situation where presidential candidates can do some “presidenting.” But one way the committee can get a better feel is to ask the candidates to produce something indicative of the way they would work. Many schools ask candidates to prepare a written response to a topic such as “Describe a vision for the future of Jesuit high schools.” But it is also possible to focus on specific skill areas the school is looking for in its next president. If strategic planning is an important skill, ask the candidates to present a strategic or tactical plan they led the formulation of or, absent that, an outline for what they would like to see in a strategic plan for a Jesuit school. If the school is concerned about fundraising skills, give the candidates profile information about a fictitious prospective donor and ask them to write a proposal to the donor. Or have them write a narrative of the biggest gift they ever asked for. If the school is concerned about supervision and people management skills, they could ask for an anonymous sample annual evaluation the candidates have done which shows their approach to evaluations. This is extra work for the committee and for the candidates, but it may be well worth it, for each desires that the candidate’s qualities be given ample play in the process. Appendix R contains a number of suggested assignments in various skill areas.

Reference checking. Asking those who have worked with the candidates in current or prior positions is the second leg of the stool, and it has become more difficult. Many schools and organizations, afraid of lawsuits, are unwilling to allow employees to give references other than a confirmation that the person worked there and the dates of employment. And even when people are willing to be interviewed about a candidate, they have become more hesitant and less candid. Nevertheless this is a step that absolutely cannot be skipped without putting the school at risk, especially if the school doesn’t have substantial prior knowledge of the candidate. We mentioned earlier that the references listed by candidates in their resumes are merely an indication of a few people who can speak well of them (with the possible exception of the candidate described earlier who is truly discerning herself and wants the committee to have well-rounded information for its discernment process). This is why it was recommended that in the application form the candidates are asked for their permission to talk to others about their candidacy. Before a president is selected, seven to ten references should have been interviewed somewhere in the process. If the school has engaged a search consultant, that firm will conduct many of the reference interviews. But the committee shouldn’t delegate this entirely to the consultant. They need to have direct knowledge and a feel for what references have said in order to discharge their responsibility.

In the application form, candidates were asked to name whom they would not want contacted, and it is important to respect this, so that they can protect their confidentiality. Often they will ask that their current supervisor not be contacted. This is reasonable, but the applicant should be told that if their candidacy progresses, the committee will have to talk to their current employer before any offer can be made. Current supervisors are the most crucial because they are most likely to know of any skeletons that could put the school at risk.
Reference checking should be both consistent and coordinated. As with interview questions, there should be a standard set for every candidate. Follow-up questions or specific questions pertaining to a candidate’s application materials or the role of the person being interviewed can also be asked. Again the law is evolving in this arena and its application may vary, so schools should preview their questions with their legal counsel. It is helpful to begin the interview with a little background about the school, the position the candidate is applying for and that he or she has given permission to ask people who know them about job-related attributes. Telling the reference that the committee wants to make sure for the candidate’s sake as well as the school’s that there will be a good match engenders a willingness to be more candid. It reminds the interviewees that their candor will be important to make sure the candidate ends up in a place where he or she will be happy.

The reference checking should also be coordinated. The chair of the committee or the consultant should serve as a clearinghouse for assigning or approving people to be asked, to avoid duplication and making contacts that would be injurious to the candidate. That having been said, it is useful, when interviewing a reference to ask if they could suggest others, especially people who could provide a different perspective on the candidate’s work. Before following up with these suggestions, the committee member would then check the name with the chair or consultant.

Please note that the sample reference questions included in Appendix U are written to ask for evidence on which the person giving the reference bases his or her judgment. It is this evidence that is most helpful to the committees rather than simply people’s opinions about the candidate, which are highly subjective and in some cases just conjectures. More sample questions can be found in the NAIS Head Search Handbook.

**Special circumstances**

During the JSEA Study several situations emerged which, though not common, were common enough that schools in similar circumstances should give them advance thought. The following are some reflections to get those thoughts started.

**Only Jesuits need apply.** In some cases, schools in the JSEA Study had made the decision that only a Jesuit president would be acceptable. This was due to a combination of believing that something important would be lost with a lay person in charge or that the school community just wasn’t ready for such a change. These are both legitimate possible conclusions for schools to reach. But the JSEA Study suggests that the decline in the pool of Jesuit candidates and the increasing number of successful models of lay leadership will obviate that approach over the next few years. If the board does want to focus only on Jesuit candidates, it should be clear about that—with its search committee, with the community and with potential candidates. Any lay person who offers himself or herself as a presidential candidate is making a considerable effort and exposing himself or herself to risk. To find that the school wasn’t really open to a lay candidate once a suitable Jesuit is found would be upsetting and unfair. In such a case the school should pursue its Jesuit candidates first and either find itself successful in hiring one, or satisfy itself that a suitable Jesuit is not available and shift its search to finding the best lay candidate. The temptation will be to start a parallel lay search as a fallback to the real search, for a Jesuit, in order to save
time should the preferred search come up empty. While this makes sense from an efficiency standpoint, it risks generating negative feelings toward the school among lay people working in the Jesuit school community.

Replacing an icon. One of the complications that surfaced in the JSEA Study was a school being faced with replacing a long-standing and beloved president. The schools where this was the case realized they needed to take this into account as they went about their work. One issue is keeping in mind the feelings of the sitting president, who may suddenly see the spotlight shift from themselves to the future president. This can catch even the humblest leaders by surprise and leave them feeling unappreciated. But more than that, the school still needs that person to be a strong leader till the end of his or her term. Although the well-being and effectiveness of the current president is not in the scope of the search committee’s responsibilities, the chair should be in communication with the chair of the board to make sure this issue is addressed.

A second implication of replacing a long-term president is that this person has created a strong image in the minds of a generation of employees, parents and alumni of what a president should be. He or she will presumably have developed productive relationships and have honed skills to a high level over time. Some candidates find the prospect of following a long-term president daunting. While others may be attracted by the institutional stability such longevity implies, they can nevertheless become victims of unreasonably high expectations in the community. At the front end of their learning curve, there is likely to be at least some disappointment with new leaders in this situation, and in some cases the disappointment can be a dissatisfaction that seriously undercuts the leadership of the new president. In such cases schools may want to consider hiring an interim for a year just to buffer the new president from these expectations.

Interims. There are several circumstances where the board may want to consider hiring an interim, including the one just mentioned. An interim can give the community time to grieve the loss of a beloved leader and let go of expectations hard-wired by years of doing things certain ways. An interim might be appropriate in the opposite situation, where a presidency has been marked by discord and dysfunction. In such a case, the interim period can allow for some healing so that the new permanent president can start with a clean slate. In both of these cases, the interim president will be someone with a different set of skills and attributes than those sought in the permanent president. For instance, the school may want to hire an interim who can calm things down, spend time listening to concerns and be a reassuring presence, while it looks for a permanent president who will challenge the school and push it in new directions again.

The school may have to hire an interim out of necessity caused by timing. A sudden death or illness can cause the incumbent to be unavailable immediately. In such cases generally someone internal to the school will be asked to fill in for the balance of the year because it would be difficult to properly vet and hire an external candidate as quickly as needed. In such a case, the board needs to make clear to the interim the conditions of the appointment. Will a search for a permanent president be conducted? Will the interim be eligible to apply? Might the board forgo a search depending on the interim’s performance?
Transparency on these questions, even if the answer is that the board doesn’t know, will head off misunderstandings and bad feelings.

In the ideal, the incumbent will notify the board by the end of the year before his or her last year. This allows a search committee to lay groundwork in the spring and summer, interview candidates in the fall and present a candidate in November, to begin the following July. If the incumbent announces the departure during his or her final year, there may still be time to conduct an adequate search, but the school may be looking at candidates left over from schools who had the luxury of acting earlier. If the search doesn’t get started until late winter or early spring of the incumbent’s last year, the school would probably be better off hiring an interim to give itself enough time to generate a robust pool of candidates and conduct a thorough process.

A similar situation applies if the school has engaged in a failed search, one that does not produce an acceptable candidate. The school may have run out of time to re-do the search, and in any event it needs time to re-think what didn’t work and to generate a new pool of candidates. This is a disappointing, even discouraging outcome, but not unheard of and indeed occurred for a couple of the schools in the JSEA Study. Rather than saddle the school with a sub-par president, the board would be wise to buy more time with an interim appointment. More on that under Failed Searches, below.

The board may decide to use the option of an interim if it sees high potential in an internal candidate but is not sure how he or she would handle the higher level of responsibility. This approach has some risks, because the potential for mismatched expectations is high. Even if the interim doesn’t assume he or she has the job, it will be painful to go back to lower responsibilities if they thought they earned it. There is high probability therefore of this scenario resulting in the loss of a valuable employee. Also, the interim whose leadership is being evaluated, is hampered by a lack of leverage when employees know he or she has only the provisional support of the board and is therefore vulnerable. In any event, again, there is a need for as much transparency as possible about how decisions will be made.

Failed searches. The best way to avoid a search which produces no viable candidates is to invest in adequate resources and time for the process from the beginning. For instance, if the committee undershoots the amount of advertising it needs, it may go into the following phases with too few candidates or have to extend the marketing phase, which risks losing the candidates the school had. It’s important not to let the process get bogged down. Unless the search committee executes its plan with discipline, the process can lose its compression, candidates can perceive it as listless and put their energies in other directions. The process could find itself without viable candidates and too little time to correct the problem. Even if it has done everything right, it is still possible that the process will not produce acceptable results. As unsavory as this prospect is for the committee, which has probably spent countless hours to this point, they and the board have to be realistic, and move as quickly as possible to an interim president and re-start the process. One school faced with this situation, put it in a positive light in a letter to its community:
“The Board will continue to consider “permanent” candidates for the president’s position, but we are not close to naming someone to the role after many months of work. Our decision on our new leader is critical to the school’s next decade and beyond, so we will not move in haste. Given the seasonal nature of the head of school search process, we are now prepared to take as long as another academic year for our search, with our current principal serving as interim President through the academic year. The fine leaders like him throughout our school today give the Board confidence that it is in good hands in the meantime.”

**Non-traditional schools.** As similar as all Jesuit schools are in many ways they also have significant differences. Some are Cristo Rey Schools which reach out to a different clientele and use a business and pedagogical model that includes paid job placements for students one day a week. Some are Nativity Schools which focus on giving under-resourced middle school children an option for college. Some include not only high schools but middle schools and some grade schools as well. Some are owned by the Jesuits and others by the local communities. Some are all-boys and some are co-ed and one is co-institutional. Some serve in large metropolitan areas and others are in “small markets.” So, while the principles for conducting a search enunciated here apply to Jesuit schools generally, they must also be adapted.

For instance, as noted earlier, Cristo Rey and Nativity Schools are more likely in some provinces to draw Jesuit candidates than traditional schools, at least for now, and at least for one to three year terms. This is because the Jesuits feel, with justification, that their physical presence in leadership can help these schools gain the credibility they need more quickly. Such schools should take this into account as they begin their search process. They will also need to attract candidates with some additional skills, such as a second language or cultural literacy with a various ethnic population, experience with impoverished communities, perhaps even a social work background in addition to education, and the ability to work with a thinner resource base, at least among the two accustomed sources—parents and alumni. While administrators from traditional Jesuit schools may be great candidates for these jobs, they and their school will have to be prepared for a learning curve in a different environment.
The next step: supporting the new president

As important as hiring a capable leader is for the school, the trajectory of his or her leadership and the well-being of the school are not determined by that decision alone. Even if the committee has made the best possible choice, and likely they have, the incoming president will start at the base of a new learning curve. The curve will be steeper for some than others, but for all of them there is, we would hope, much personal development ahead. Having finished an exhausting search process, the temptation for the school’s board may be to let down, to presume that with a president taking the wheel, the board can rest in the passenger seat for a bit. But in the first year and the next few beyond that the new president’s growth and development must be guided, supported and monitored by the board. This will not be as time-intensive as the search, but it is every bit as important.

President’s growth plan.  While this ongoing responsibility belongs to the board, and is beyond the purview of the search committee, the board will rely on the committee to at least help set the proper wheels in motion. During the course of the selection process, the search committee has learned a great deal about the strengths and weaknesses of the new president. In addition to recommending the new candidate to the board for approval, the steering committee should also give the board its recommendations for a growth plan for the new president. With some boards it may not be appropriate to give all members a complete rundown of areas of possible concern. This may undercut the new president’s credibility because of the difficulty for board members less involved with the process putting these concerns in their proper context. It is also difficult for some boards to maintain adequate confidentiality, and the president has as much right to his or her privacy as any employee. But the board chair should be given as complete a picture as possible and the board as a whole should receive a constructive growth plan aimed at maximizing the president’s effectiveness.

Earlier, in a section called Expectations of the President, we talked about four dimensions, or models, of the school—Apostolic, Pedagogical, Community and Business. These are a good framework for the committee to identify growth areas for the new president. We noted that the successful candidate will generally be strong in one of these areas, and have familiarity with a couple others, and may be inexperienced with a fourth. Take, for example, presidents who were principals in their prior position. A principal will presumably have a strong grasp of the Pedagogical Model, good experience in the Apostolic and Community Models, but may be a neophyte in the Business Model.

Using this framework, the search committee should identify in which of the models the chosen candidate has strengths and areas for growth. In many cases the committee won’t be sure, so in addition to clear strengths and growth areas, there may be unknown areas. The committee can prepare a spreadsheet broken down in the first column by the four models with various individual areas listed under them. The next three columns would be check boxes to indicate whether each area is perceived to be as one of strength already, an area where growth is needed or a question. Next to this would be a column for suggested methods for strengthening the areas where growth is needed, indicating available resources like
books or seminars, and recording any steps that are agreed to for the growth plan. A sample Growth Plan Sheet can be found in Appendix X.

To build on the example used earlier, the new president may have served as principal in a school that had a strong Jesuit president. The principal may have been in few situations when she was asked to be the spiritual leader, because the president covered that need so completely. In this case, we might have questions about her capacity for spiritual leadership. What sometimes happens in such a case is that boards call on someone else, often a Jesuit if one is available, to fill the vacuum, assuming he will say all prayers at meetings and events, for instance. But this only exacerbates the problem. Rather, the board should help the new president assess and grow her strengths in this area. She might be encouraged to strengthen her understanding of Ignatian spirituality through spiritual direction and/or by doing a year-long “19th Annotation” version of the Spiritual Exercises. And she would be encouraged to take progressive opportunities to share her experience and grow into her role as a spiritual leader.

In another case, a new president who has no background in financial management may be encouraged to take a class at a local university, or be given a tutorial by the school’s auditor or finance committee chair.

Once this Growth Plan Sheet is filled out, the chair of the search committee or board should sit down with the selected candidate to discuss it candidly and constructively. The new president will have the best idea of where he needs to grow, personally, professionally and spiritually. While he may be reluctant to appear deficient in any area, he should also realize that this is the moment to avail himself of the support he needs from the board to be successful. With his input, additional growth areas may be identified or areas where there were questions or perceived weaknesses may turn out not to be concerns.

It’s also important that the Growth Plan not be too ambitious. This is one of those areas where less is more. The new president will have many demands and hopefully will be around a long time, so it is wise to set reasonable goals and timelines or the Growth Plan may collapse from its own weight. Jim Collins, in his book, Good to Great, analyzed companies that made the transition from being good companies to outstanding leaders in their industries. He talks about the flywheel effect as these companies began their efforts to improve. The beginning of any change will generally feel like getting a heavy flywheel to turn. It can feel so slow and heavy that we fear we are not making any progress. This is often when we give up and say, “Well, that didn’t work.” But if we stick with it, the wheel slowly picks up momentum, and eventually is whizzing around and sustained with little effort. A president adding new skills to his repertoire needs patience and it is critical that his board give him time to develop.

**Coaching.** Some Jesuit school boards have hired executive coaches for their presidents. While in some cases this may be in response to perceived weakness, in others the board just considered it a good investment in their new hire. Even if the school doesn’t make this investment, it should still find, or help the president find, someone who can serve as a mentor in the first few years. This might be a retired president or a more experienced sitting president at another school. It should generally not be someone at the same school, so that the president can be as candid and disclosive as possible without fearing the impact on his constituents’ perception of her. It may not be enough to assume that the president will
make these arrangements if she needs them. In her first year she will be besieged by demands and will feel that taking time or resources for herself would put her presidency at risk. Besides, new presidents often don’t want to send the message they need help. So the more this can just be part of normal expectations the more it is likely to happen and be perceived in a positive light. If providing an outside coach or mentor isn’t appropriate, members of the board and search committee can be available for coaching, and this might even be formalized into a 2-3 member transition support committee.

**Spiritual direction.** In a Jesuit school, there is another kind of coaching that can be beneficial. Spiritual direction is a trademark of the Society of Jesus, and few do it better than the Jesuits and the lay people they have trained. Our schools would be foolish not to take advantage of this. Most new presidents of Jesuit schools already realize how helpful and life-giving having spiritual direction would be. But if this isn’t encouraged by the board at the beginning, the prospect of dedicating time, asking a spiritual director to dedicate time, and investing money in director’s fees, in the midst of so many urgencies, can be daunting. The Growth Plan should encourage the president to seek a spiritual director, help provide names of potential directors and where necessary, commit budget money to pay for travel and fees. It should also encourage the new president to make the Spiritual Exercises in some form if he has not already done so (including, somewhere in the first three years if possible, the full 30 day silent retreat). The caveat here is that neither spiritual direction nor the Exercises should be a mandatory assignment. For them to be effective, one has to be ready and one has to freely choose to do them. The role of the Growth Plan in this case is to remove as many obstacles as possible that might prevent a new president from availing himself of the opportunity.

**Goal setting.** Related to the Growth Plan is the practice of setting goals for the first year. These are important because they give the new president a clear set of expectations which she can use to make strategic choices from many possible activities. These goals can then be used to evaluate the president at the end of her first year. Board and search committee chairs in this role at a Jesuit school for the first time should be careful about two things. First, they shouldn’t shoot for the moon. Goals will lose their meaning if there are too many or they are unrealistic. The new president will be overwhelmed just learning people’s names, the new culture and the political contours of the school community. Second, be patient with the accomplishment of these goals. Imagine that this person will be president for the next ten years and what you want the school to look like at that point. Then ask what really needs to be accomplished by the president in the first year for that to happen. This is where having a long-range strategic plan will help. If the school has a vision for where it wants to be 5-10 years from now, it won’t be as distracted by the urgencies of the moment, and neither will the president.

**Evaluations.** We wish we could assume that nothing need be said about evaluation of the president and that all Jesuit schools already have that hardwired into their processes. In fact, however, many schools do not evaluate the president or do a sporadic job of it. In cases where a Jesuit was appointed by the Provincial, the board might not feel it has the right, let alone the responsibility, to pass judgment on the president. In other cases, a long-sitting lay or Jesuit president may have been instrumental in recruiting the board, and regardless of what the by-laws say, the board feels like they are supervised by the president.
rather than the other way round. Even when an evaluation process is in place, boards can get complacent when things are running smoothly and skip or truncate the process.

For a school which has not been doing regular and meaningful evaluations of the president, the hiring of a new one is an occasion for correcting this shortcoming. This not only helps the board discharge its responsibility, but should be encouraging and supportive for the president. While most employees, including presidents, have anxieties about being evaluated, benign neglect has a way of coming back to haunt them when expectations start to diverge and they don’t realize it until it’s too late. The board should consider an evaluation process that includes a review of performance against agreed-upon goals (both institutional and personal) and against the job description, a self-evaluation by the president, and a 360 degree survey including board, administrative team and a sampling of employees, parents, alumni and benefactors. The president’s annual review would also be the time for setting goals for the coming year. The evaluation should be conducted confidentially by a committee of 2-3 board members, generally including the chair and vice chair. The results and the goals for the coming year should be shared with the whole board during a scheduled executive session, with the president present for part and absent for part.

Introducing the president. One of the indispensable forms of support the board and members of the search committee can give the new president is introducing him or her to their contacts in the community. Often the development director will coordinate a strategy for appearances and individual meetings, helping the president to prioritize all the possibilities. Board members can host social events in their home, or simply invite the president to come to parties or as a guest at their clubs. While it’s easy to see the importance of this, there can be some awkwardness about actually doing it. Board members may not know the president well enough to know how he or she will fit in a certain setting. Is he uncomfortable with formal events, or with very casual activities? The president may be an introvert and uncomfortable in unstructured social settings, or the president’s spouse may be uneasy in such settings. Board members should be cognizant of the proclivities of the new president, in order for him or her to be successful, some of this social “coming out” is essential for his or her success.

Chain of care. In addition to introducing the president to the community, board members should look for opportunities to get to know the new president on a personal level. Inviting him to lunch or with his spouse to their home for dinner or a 4th of July party helps to build that human trust which is so important to how effectively people work together. It will make the new president realize that he is supported and loved, and free him up to be more open and honest with board members.

This returns us to something we discussed earlier—the Chain of Care. At the core of a Jesuit school is the students’ experience of God’s loving, creative presence in their life. That presence is experienced in relationships. If students feel loved, supported and cared for by their teachers, a care that includes being held accountable, they will be open to God’s love and the growth God intends for them. But teachers need love and care as well from their administrators. And administrators need to experience love and care as well. For the president, love, care and support—what the Jesuits call cura personalis—must come from the board. The board has hired the president and the board supervises and evaluates the president.
For the president to do her job, she must be supported by the board (and her spouse must be part of this as well). Just as between teachers and students, an important part of that support is holding the president accountable, calling him to be the best he can be. When this Chain of Care is strong, the school is strong, and it may be many years before it needs another presidential search committee.
In the area of leadership, the Jesuit Secondary Education Association wants to be as helpful to its member schools as possible, working within the limits of available resources. While JSEA’s services are evolving and subject to ongoing evaluation, the following is what JSEA is currently providing in the area of finding, forming and supporting leadership for member schools.

**Candidate Identification:** JSEA offers the Leadership Discernment Program for persons identified by or to board chairs, sitting presidents, or provincials who might consider being president. This is a long-term effort, since the process of discernment, readiness to seek the president’s position, and alignment with an appropriate search might happen over the course of several years. In addition, JSEA has determined that appropriate preparation for the president’s position would best include personal experience with the full Spiritual Exercises, some familiarity with board service (at least at the committee level), and some experience with advancement. Information about the Leadership Discernment Program is available on the JSEA website.

**National Conferences:** The JSEA convenes a biennial national Presidents’ Conference, overlapping with the JSEA Trustees’ Conference. At these conferences, presidents separately and also together with board leaders from the large majority of Jesuit schools interact about their position, their leadership, and their concerns, with a particular emphasis on Jesuit mission. Presentations deal with issues vital to the future of these Jesuit schools. Participants find these Conferences valuable particularly for their interaction and networking with colleagues from Jesuit schools that share a wide variety of directions and concerns.

**Information:** JSEA gathers and makes available information about leadership changes among member schools. This includes a national perspective on current and coming searches, range of years of tenure typical of presidents, issues relevant to short or long tenure, and trends concerning the position. JSEA conducts periodic surveys on the role of president and the key president-principal relationship as well as surveys of salaries for information to presidents.

**Consultation:** JSEA is among the sources of support for board chairs and search committee chairs. JSEA also offers support and networking for presidents. This can be particularly helpful early on for those new to the president’s position.
Appendices

The following Appendices can be found in the companion volume or on-line at www.jsea.org/resources/presidential-transition-materials:

Appendix A: JSEA Presidential Search Checklist, JSEA Staff
Appendix B: Sample Succession Plan, Jesuit High School, New Orleans
Appendix C: Sample Resignation Announcement, Fordham Preparatory School
Appendix D: Office of the President of a Jesuit High School, JSEA Staff
Appendix E: Qualities for a President of a Jesuit Secondary School, CAPE
Appendix F: Questions to Discuss with your PASE, Sean Agniel
Appendix G: Profiles of Search Consulting Firms
Appendix H: Outline of Request for Information for Search Consultants
Appendix I: Sample Announcement of Search, Fordham Preparatory School
Appendix J: Sample One-page Job Description, Education Access Strategies LLC
Appendix K: Venues for Posting Position
Appendix L: Sample Position Advertisement, Loyola Blakefield
Appendix M: Sample Marketing Brochure, Education Access Strategies LLC
Appendix N: Sample Search Update, Fordham Preparatory School
Appendix O: Sample Constituent Surveys, Fordham Preparatory School, Education Access Strategies
Appendix P: Constituent Forums
Appendix Q: Application Form
Appendix R: Potential Demonstration Assignments for Candidates
Appendix S: Sample Interview Questions
Appendix T: Form for Evaluating Interviews
Appendix U: Sample Reference Check Questions
Appendix V: Form for Evaluating Candidates
Appendix W: Sample Ignatian Discernment Process, Bruce Maivelett SJ
Appendix X: New President Growth Plan Worksheet
Appendix Y: Sample Announcement of Selection, Loyola Blakefield
Appendix Z: Sample Announcement Schedule, Loyola Blakefield
Further Reading

The reader can obtain further information on the topics covered in this book from the following publications, which were used in the JSEA Study:


Managing for Mission: Pursuing the Magis in Jesuit Schools, Jack Peterson, Lulu Press, 2012, 364 pages. An in-depth analysis of the four dimensions of a Jesuit school which the president is called on to manage. Would be of more use to the new president, but search committee members can learn more about the challenges facing the president of a Jesuit school.

Catholic High Schools: Facing the New Realities, James L. Heft, Oxford University Press, 2011, 262 pages. An analysis of trends in Catholic secondary education across the US. Chapter 6 discusses the leadership challenges facing Catholic Schools, and what is expected of the school’s chief administrator.

The First 90 Days: Proven Strategies for Getting up to Speed Faster and Smarter, Michael D. Watkins, Harvard Business Review Press, 2013, 304 pages. With advice for leaders in new positions, this book might be recommended to newly hired presidents, though it has useful information for board members who want to support them in their transition to a new school and/or new responsibilities.
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