2013

Executive search firms' consideration of person-organization fit in college and university presidential searches

James Christopher Turpin
William & Mary - School of Education

Follow this and additional works at: https://scholarworks.wm.edu/etd
Part of the Higher Education Administration Commons, and the Organizational Behavior and Theory Commons

Recommended Citation
https://dx.doi.org/doi:10.25774/w4-fxk9-sq63

This Dissertation is brought to you for free and open access by the Theses, Dissertations, & Master Projects at W&M ScholarWorks. It has been accepted for inclusion in Dissertations, Theses, and Masters Projects by an authorized administrator of W&M ScholarWorks. For more information, please contact scholarworks@wm.edu.
EXECUTIVE SEARCH FIRMS' CONSIDERATION OF PERSON-ORGANIZATION FIT IN COLLEGE AND UNIVERSITY PRESIDENTIAL SEARCHES

A Dissertation

Presented to

The Faculty of the School of Education
The College of William and Mary

In Partial Fulfillment
Of the Requirements for the Degree
Doctor of Philosophy

By

James Christopher Turpin

December 2012
EXECUTIVE SEARCH FIRMS' CONSIDERATION OF PERSON-ORGANIZATION FIT IN COLLEGE AND UNIVERSITY PRESIDENTIAL SEARCHES

by

James Christopher Turpin

Approved December 11, 2012 by

Dorothy E. Finnegan, Ph.D
Chairperson of Doctoral Committee

Charles F. Gressard, Ph.D

Eugene Roche, Ed.D
Dedication

I dedicate this dissertation in loving memory to my mother Mary Turpin who was a College of William and Mary alumna and always supportive of my continuing education.
# Table of Contents

Dedication ........................................................................................................................ iii

Table of Contents ............................................................................................................. iv

Acknowledgement .......................................................................................................... viii

List of Figures .................................................................................................................. ix

Abstract .......................................................................................................................... x

Chapter 1: Introduction ................................................................................................... 1

Statement of the Problem ............................................................................................... 6

Statement of Purpose ....................................................................................................... 7

Limitations and Delimitations ......................................................................................... 11

Chapter 2: Review of the Literature ............................................................................... 13

P-O Fit Theory Research ................................................................................................ 13

Defining P-O Fit .............................................................................................................. 14

P-O Fit Dimensions ........................................................................................................ 17

Organizational entry ....................................................................................................... 18

Outcomes ..................................................................................................................... 20

Retention ....................................................................................................................... 21

Job Satisfaction/Organizational Commitment .............................................................. 22

Job Performance ........................................................................................................... 23

Socialization ................................................................................................................... 24

Summary ......................................................................................................................... 27

Presidential Search Firms ............................................................................................... 28

Process ............................................................................................................................ 29
Confidentiality ................................................................................................... 29
Presidential Search Consultants ......................................................................... 30
Summary ............................................................................................................ 39
Chapter 3: The Research Design ........................................................................ 41
The Conceptual Framework .................................................................................. 43
Business Environment ........................................................................................ 49
Values ................................................................................................................. 49
Heroes ................................................................................................................. 50
Rites and Rituals ................................................................................................. 50
The Cultural Network ......................................................................................... 51
Methodology ......................................................................................................... 54
Design of the Study ............................................................................................. 57
Data Collection .................................................................................................... 60
Data Analysis ....................................................................................................... 64
Chapter 4: Normative Presidential Executive Search Firm Processes ................... 67
Are We Really that Different? ............................................................................... 68
Organizational Dimensions .................................................................................. 68
Search Consultant Background and Experience ................................................. 69
Self-Perceived Service Differentiation ............................................................... 70
Intelligence Gathering ........................................................................................ 72
Print Materials ................................................................................................. 72
Campus Visits and Interviews ............................................................................ 74
Observations ....................................................................................................... 76
<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Limitations Due to Tradition</td>
<td>112</td>
</tr>
<tr>
<td>Assessment</td>
<td>112</td>
</tr>
<tr>
<td>Outcomes</td>
<td>113</td>
</tr>
<tr>
<td>Communication</td>
<td>114</td>
</tr>
<tr>
<td>Recommendations</td>
<td>115</td>
</tr>
<tr>
<td>Process Improvements</td>
<td>116</td>
</tr>
<tr>
<td>Socialization</td>
<td>116</td>
</tr>
<tr>
<td>Leadership Fit</td>
<td>117</td>
</tr>
<tr>
<td>Improved Communication</td>
<td>117</td>
</tr>
<tr>
<td>Future Research</td>
<td>119</td>
</tr>
<tr>
<td>References</td>
<td>121</td>
</tr>
<tr>
<td>Appendices</td>
<td>135</td>
</tr>
<tr>
<td>APPENDIX A: Participant Invitation Letters</td>
<td>136</td>
</tr>
<tr>
<td>APPENDIX B: IRB Consent Form</td>
<td>140</td>
</tr>
<tr>
<td>APPENDIX C: Interview Questions</td>
<td>141</td>
</tr>
<tr>
<td>VITA</td>
<td>144</td>
</tr>
</tbody>
</table>
Acknowledgments

I would like to acknowledge my family, as it would have not been possible to complete
the degree requirements without their support. My wife, Kym Turpin, and our three boys James,
William, and Robert Turpin have stood by my side for the last nine years and are extremely
proud of my accomplishment. My father, Gene Turpin, has been interested and supportive of my
continuing education and proud of my achievement. As well, I would like to acknowledge my
mother, Mary Turpin. She would have been so proud to see me receive my doctoral degree.

I would also like to acknowledge others who have had a lasting impact on my
professional career as a human resource executive, adjunct professor, and as a doctoral student.
Dr. Robert Kelley, an alumnus of the Higher Education Program at The College of William and
Mary, as my mentor, colleague, and friend who was instrumental in helping me work through the
decision process to embark on the doctorate journey. Dr. Dick Leatherman, the Human
Resource Department Chair at the University of Richmond where I taught as an adjunct
professor, has been my advocate and supporter since the day I met him.

Lastly, I would like to acknowledge Dot Finnegan, Ph.D., my professor for many higher
education courses, including my first course at The College of William and Mary, the History of
Higher Education, and chairperson of my doctoral committee. There were peaks and valleys
throughout the process, but at the end of the day it was Dot who helped me get to the finish line!
List of Figures

Figure 1  Executive Search Firm P-O Fit Process.................................48
Figure 2  Cultural Elements and P-O Fit..............................................52
Figure 3  Institutional Cultural Elements and P-O Fit Integration........54
Figure 4  Presidential Applicant Filtering Funnel..................................90
Figure 5  Cognitive Turning Point......................................................96
Figure 6  Firm Assessment Methods by Size of Firm...........................99
Figure 7  Model of Firm Insider- Outsider Roles.................................108
Abstract

EXECUTIVE SEARCH FIRMS' CONSIDERATION OF PERSON-ORGANIZATION FIT IN COLLEGE AND UNIVERSITY PRESIDENTIAL SEARCHES

Largely what is known about P-O Fit stems from research conducted in business organizations. Surprisingly with such an important position as a college or university president, P-O Fit has not been empirically studied in the presidential selection process, much less from the perspective of the executive search firms that conduct these searches.

This qualitative case study sought to determine to what extent executive search firms that specialize in presidential searches in higher education considered and used the concept and characteristics of P-O Fit, which included the components of organizational culture, in the selection process of public and private college and university presidents. This study uncovered three essential findings in the executive search firm process: shifting role boundaries, traditional role expectations, and limitations due to tradition.

Deficiencies in the search process are mostly due to the search firms lacking development and advancement of P-O Fit components in their traditional search practice, ambiguity of P-O Fit, and the search committee's lack of understanding and relevance of P-O Fit in the presidential search process. Limitations due to traditional norms underscore the opportunities for the inclusion of socialization, leadership fit, and improved communication of P-O Fit information to improve upon the normative presidential search process.

JAMES CHRISTOPHER TURPIN

HIGHER EDUCATION POLICY, PLANNING, AND LEADERSHIP PROGRAM

THE COLLEGE OF WILLIAM AND MARY IN VIRGINIA
A critical element in the success of higher education in the United States has been its leaders. "The remarkable history of American higher education has been written around strong presidents and institutions have been personified by those who led them ..." (Association of Governing Boards of Universities and Colleges, 1984, p. 11). Regardless of the historical track record, contemporary college and university presidents face many challenges that their predecessors did not. Some of these challenges today include rapid technological advancements, changing demographics, increasing demand for education and training, fundraising, new ways of delivering instruction, and a greater presence of accountability. All of these new issues, coupled with the institution's mission and competing constituencies, place an extreme amount of responsibility on and present critical challenges to the college or university president (American Council on Education, 2007). Setting the challenges and responsibilities is the role of the governing body of the institution to which the president is accountable. Few relationships are more important for a college or university president than a successful relationship with the institution's governing board.

The governing board is ultimately accountable for the conduct of the institution. The governing board has the supreme legal responsibility for both fiscal and policy matters of the institution (Kaufman, 1980). In addition, the governing board plays the central role in facilitating the selection and appointing process of new college and university presidents. Its most important task is to choose and work with the president. "It stands to reason that boards seeking a leader to hit the ground running need to look beyond academic credentials and conduct a more effective assessment of previous experience, willingness to learn, and institutional fit"
PERSON-ORGANIZATION FIT  

(Kaufman, 2004, p.1). Institutional fit is synonymous with the concept used by organizational theorists called Person-Organization Fit (P-O Fit). Leaders and decision makers must be cognizant of the institution's culture in order to execute strategies that are in congruence with the culture. Therefore, institutional culture should be seen as the heart of the institution that staff, administration, faculty, and others experience. The culture affects the service, quality, productivity, and financial results of the institution. Imperatively, the culture of the institution through the lens of the institution's constituents directly affects the attraction and retention of competent and effective leaders.

Grounded in the fields of cultural anthropology, organizational management, psychology, and sociology, organizational culture is a primary element in the conceptualization of P-O Fit (O’Reilly, Chatman, & Caldwell, 1991; Thomas, Chorba, & Kumiega, 1990). Anthropology first conceptualized culture as a broad, unique, and powerful pattern of cognitions and behaviors that influence a group (Coeling & Simms, 1996). This concept has been carried into the workplace by researchers and consultants to examine work groups, corporate culture, context, and the effects of context on outcomes and became known as organizational culture (Deal & Kennedy, 1982; Peters & Waterman, 1982; Van Maanen & Barley, 1985). The culture of a group such as an organization or institution may be best defined as “a pattern of shared basic assumptions that the group learned as it solved its problem of external adaptation and internal integration, that has worked well enough to be considered valid and therefore, to be taught to new members as the correct way to perceive, think, and feel in relation to those problems” (Schein, 1992. p. 12).

Edgar Schein and Gareth Morgan are two of the most cited organizational theorists who have researched and written extensively about organizational culture. Schein (1985) and
Morgan's (1997) principles of organizational culture fit most organizations and are applicable to college and universities.

How does organizational culture fit institutions such as colleges and universities? The institutions, as is true of many organizations, are directed to specific purposes that are fairly well understood by all participants. These purposes influence the members of the organization to behave in certain ways that are aimed at the accomplishment of organizational goals. (Budd, 1998, p. 43)

Schein and Morgan bring together a conceptual view of organizational culture. Organizational culture consists of the set of assumptions, as Schein previously defined, about the organization that is held in common and taken for granted in the organization. Therefore, organizational culture is expected to have an important bearing on the behavior of people within the organization (Cooke & Szumal, 2000; Chatman & Barsade, 1995; Martin & Siehl, 1983; Schein, 1985).

P-O Fit theory can be broadly defined as the compatibility between individuals and institutions. The basic premise is based on the degree to which the personal attributes of an individual are congruent with the characteristics of a target organization contributes to important positive individual and organizational outcomes (Rynes & Gerhart, 1990). In the employee selection literature, P-O Fit is conceptualized as the match between an individual and organizational attributes (Judge & Ferris, 1992; Rynes & Gerhart, 1990). Achieving high levels of P-O Fit through the recruitment and selection processes is desirable because P-O Fit is related to an increase in job satisfaction and commitment on the part of the employee and results in retention (Kristof-Brown, Zimmerman, & Johnson, 2005; Verquer, Beehr, & Wagner, 2003).
Thus, the concept should be considered in selecting employees as established in recent meta-analyses (Hoffman and Woehr, 2006; Kristof-Brown, et. al, 2005; Verquer, et. al, 2003).

Obviously, a search for a new president of an institution is a period of transition. Institutions have an opportunity when vacancies come open for the position of college or university president to facilitate an effective transition. “Transitions are opportunities for organizations to look back and look ahead, to think about their environments and to respond by selecting a leader whose strengths match the new challenges” (Gilmore, 1988, p. 6). Those responsible in institutions of higher learning for the selection process currently have the tools and techniques (assessment tests for skills, knowledge, and abilities) to assess Person-Job Fit; however they generally lack assessment techniques and a deeper understanding and awareness of P-O Fit. “The exchange of information during the search process often is the key element in determining the success or failure of a college presidency” (ACE, 2007, p. 53).

When the presidential selection process is well designed, strategically evaluated, implemented and executed well, presidential selections are more likely to be effective and long lasting (Fisher, 1991). The consideration of P-O Fit in the board’s presidential search and selection process can add value for better suited outcomes for the board, president, and institution.

The corporate sector has been employing executive search firms to recruit leadership candidates since post World War II (Hartley & Ness, 1981). Higher education’s use of executive search firms can be traced to the mid 1970’s with the formation of the Academy of Educational Development and Academic Search Consultation Service (Mottram, 1983). The services have expanded to include approximately 10 major for-profit and non-profit executive search firms in addition to numerous individual consultants and small boutique firms
(Lingenfelter, 2004). Executive search firms began to play a larger role in presidential searches as the selection process became more complex with influences of affirmative action, shared governance, challenges to confidentiality from open meeting laws, and new technologies further necessitating governing boards' consideration of professional presidential search consultants.

The American Council on Education (ACE) provides the only source of data on the recruitment of college presidents in all sectors of American higher education. Based on 2006 data, *The American College President: 2007 Edition* includes information from 2,148 presidents of public and private colleges and universities across the country and was the largest survey since ACE began researching the presidency in 1986. ACE found that 52% of the 2004-2006 presidents were recruited and hired with the use of a search firm, which is a 30% increase in search firm engagement as compared to only 22% in 1986. However, even with this increase in professional assistance and critical to the issue of P-O Fit, ACE (2007) found that one in five presidents did not have a clear understanding of some aspect of the campus or job at the time of acceptance. Not known is what percentage of these presidents were hired through search firms.

The combination and intersection of college and university presidents, P-O Fit, and executive search firms that specialize in presidential searches provides a unique perspective to an empirical study. The research literature is vast in the areas of P-O Fit and the selection of college and university presidents, however only three empirical studies have explored the executive search firms that specialize in presidential searches. Despite college and university presidents being released from employment for reasons that often involve issues related to organizational culture and more importantly P-O Fit, no research to date has explored P-O Fit and executive search firms that are engaged by governing boards 52% of the time to conduct presidential searches.
Statement of the Problem

Governing boards gaining competency in the concept of P-O Fit will be able to better fulfill their role of stewardship for the institution in regards to presidential selections. P-O Fit is a key element to maintaining an engaged and committed workforce that is necessary in competitive work environments and tight labor markets (Bowen, Ledford, & Nathan 1996; Kristof, 1996). Governing boards that understand P-O Fit in the context of their own institutions and are able to incorporate P-O Fit into their presidential selection process stand the opportunity to impact “… long term positive outcomes attributed to person-organization fit include turnover, work attitudes, pro-social behaviors, work performance, and organizational outcomes” (Kristof, 1996, p. 18).

The problem of this study was to determine to what extent executive search firms that specialize in presidential searches in higher education considered and used the concept and characteristics of P-O Fit, which included the components of organizational culture, in the selection process of public and private college and university presidents. To answer this problem, several research questions were asked:

Research Questions:

1. How do search firms define their role and operate in terms of the elements of P-O Fit?

2. To what extent are the components of organizational culture a part of that definition?

3. In what ways and to what extent do search firms seek an understanding of the culture of an institution for which it is assisting a presidential search?

   a. How is this understanding, if it exists, utilized in the process of the search?
4. To what extent do executive search firms assess P-O Fit of candidates in the presidential selection process?

a. If so, what are the criteria involved in the assessment of P-O Fit?

b. How much weight is given to P-O Fit in suggesting finalists to the governing boards that hired them?

c. Do the search firms believe that their assessment of P-O Fit vis-à-vis the candidates significantly affect the outcome of the search?

**Statement of the Purpose**

The research on P-O Fit is centered on the employment interactions of organizational entry, individual and organizational socialization, and long-term outcomes associated with P-O Fit congruence. Largely what is known about P-O Fit stems from research conducted in business organizations. Schein (1991) directs researchers away from quantitative methods and towards qualitative and clinical research paradigms in the study of organizational culture.

We have largely adopted a traditional research paradigm that has not worked very well, a paradigm that has produced very reliable results about very unimportant things, and sometimes possibly invalid results altogether. In that process I believe we have lost touch with some of the important phenomena that go on in organizations, or have ignored them simply because they were too difficult to study. (p.2)

Studies of P-O Fit have produced varying statistical relationships with key constructs "making it difficult to interpret research findings let alone identify subtle variations between individuals and across organizational contexts (Lindholm, 2003, p. 130). The findings based on cross-sectional ratings obtained immediately after initial screenings make it difficult to interpret research findings because of questions about the degree to which prior conclusions were bound
to that particular methodology (Rynes, et al, 1991). "Therefore, understanding the functional nature of relationships between people and their work organizations calls for a qualitative approach to investigating the causes and consequences of people’s experiences and behavior at work" (Lindholm, p. 130).

The research on P-O Fit, college and university presidents, and executive search firms specializing in presidential searches in higher education has produced several implications for higher education. First, approximately 300 to 400 college and university presidents are replaced each year (ACE, 2007). ACE (2007) is projecting an increased turnover in the position of college and university president within the next 10 years. Presidents are older with 49% aged 61 or older as compared to 20 years ago when presidents age 61 or older represented only 14% of the population. This shift suggested a significant turnover as college and university president retire in the near future.

The presidential search process is usually very lengthy, involves a large number of people, and absorbs a lot of campus energy. Then, once a president is hired, the integration process into the institution can have either a positive or negative effect on an institution, its constituents, and the new president depending on how the process is approached and managed. The impact of ineffective leadership integration into the institution can often end up publicized by the media. Ineffective integrations into an institution spotlight the necessity of achieving good “fit” through an effectively facilitated presidential search process (Bornstein 2003; Neff & Leondar, 1997). The process of bringing a new president to campus is multifaceted and requires four phases to the process through recruitment, selection, hiring, and orientation.

Second, governing boards and institutions using executive search firms pay fees for services ranging from $50,000 to $150,000 with additional costs for expenses. The fees are
typically one-third or more of the president’s first-year cash compensation (Lingenfelter, 2004). An appointment by the governing board that results in a poor fit between the president and the institution could result in a short presidential tenure and require the selection process to be reinitiated within a few years. When the selection process is ineffective the cost is far more expensive than the executive search firm fees as it can be harmful to an institution’s stability and public image. The U.S Department of Labor estimates that the cost (both real costs, such as time taken to select and recruit a replacement, and also opportunity costs, such as lost productivity) of replacing a senior executive is approximately three times the person’s annual salary (SHRM, 2009). The median salary for a college or university president is $360,000 (ACE, 2007). Based on the Department of Labor’s cost of turnover formula it could cost a college or university in excess of $1,000,000 for the turnover of a president.

Third, executive search firms and governing boards that are cognizant of and utilize the concept of P-O Fit would be in a better position to fulfill their role of stewardship for their client institutions in regards to presidential selections. P-O Fit is a key element to maintaining an engaged and committed workforce that is necessary in competitive work environments and tight labor markets (Bowen, Ledford, & Nathan 1996; Kristof, 1996).

Clearly, the role of college or university president is a crucial component to an institution’s success. The literature on the presidential selection process is comprehensive in terms of the process and methods. One gap in the literature is the lack of focus on matching the presidential candidate with specific job criteria and institutional needs through the selection process. Person-Job Fit (P-J Fit) is an important concept that involves matching the knowledge, skills, and abilities of individuals with the characteristics of jobs (Edwards, 1991). Although matching the job responsibilities to the candidate’s skills, knowledge, and abilities is a crucial
component of the selection process, only sparse discussion in the literature addressed the cultural aspect of the candidate and the institution. Institutions are becoming increasingly concerned about the congruence between employees and the institution or P-O Fit because of its positive impact on retention, satisfaction, and performance (Cable and Judge, 1996).

Schools of thought differ in their interpretation of the importance of organizational culture; however they all share a common goal of understanding the organizations within this society. The organizational culture approaches to understanding and meaning apply to organizations, while relying on explorations into different aspects of an environment, the people, and the nature of their work. Due to the varying approaches to understanding organizational culture and various schools of thought, an organizational culture approach was a particularly conducive means of studying all aspects of higher education especially the P-O Fit and the presidential selection process through the lens of executive search firms specializing in presidential searches.

Higher education does benefit by improving the selection process and associated outcomes for college and university presidents. “To effect change, boards as well as college stakeholders must recruit presidents with a leadership style and approach that are appropriate for the organizational culture” (McPhail, 2005, p.140). Executive search firms and governing boards that have developed an awareness and understanding of P-O Fit with their clients or within their institutions would add valuable contributions to the selection process of a new college or university president. “Bad searches can produce good candidates and vice-versa, but in general it is fair to say that good searches are likely to produce superior candidates” (McLaughlin & Riesman, 1990, p. 336).
Limitations and Delimitations

Delimitations narrow the scope of the research (Locke, Spirduso, & Silverman, 2007). This study was delimited to the construct of P-O Fit in the recruitment and selection process of new college and university presidents through the perspectives and experiences of executive search firms. A further delimitation of the study was only concerned with interviewing specific executive search firms, which included firm CEO's and consultants that had experience conducting college and university presidential searches in the United States. The firms explored in this study had conducted more than 25 executive searches annually; a minimum of 20 presidential searches over the last five years, and had been in the presidential search business a minimum of five years. The search firms for the study were chosen from the Roundtable of Executive Search Firm ACE membership. A query of the ACE Roundtable of Executive Search Firms reported 10 firms that specialized in presidential searches that fit my criteria. These 10 firms were invited to participate in the study. In addition, a contact person was listed for each firm and served as the direct contact when I initiated my request for participation. I interviewed a minimum of one person from each search firm, ideally the CEO or a Principal of the search firm and additional firm executives, if they were available for the study.

Limitations identify potential weaknesses in a study (Locke, Spirduso, & Silverman, 2007). Due to the unique sample available for this study, 10 executive search firms that specialize in presidential searches according to the ACE’s Roundtable of Executive Search Firms, the sample participants were not randomly chosen and therefore were a self-selected sample. All the subjects in the study were volunteers and had the option to withdraw from the study at any time. The participants who finished the study might not, therefore, be truly
representative of the population. Due to the selection criteria the participants may have been more successful firms and therefore less successful firms may not be represented.
Chapter 2

Review of Literature

This discussion presents the literature covering the critical issues of the research, starting with an introduction to the research literature and definition of P-O Fit. Then focusing closer to the research domain, I address the organizing dimensions of P-O Fit, a critique of P-O Fit, and presidential search consultant literature. Numerous studies support the positive outcomes associated with P-O Fit. Few studies have analyzed college and university presidential search consultants and no research trend has explored the consideration and use of P-O Fit by executive search firms specializing in presidential searches in the selection process.

P-O Fit Theory Research

The concept of Person-Organization Fit (P-O Fit) in employee selection has grown in prominence in recent years with psychology leading the conceptual development and the human resource researchers examining the implications for practice. Psychology, human resource researchers, and human resource practitioners advocate the importance of values congruence fit between people and the organization. Of late, employee selection researchers exploring organizational culture have focused primarily on P-O Fit. P-O Fit is related to many positive outcomes indicating that the concept should be considered in selecting employees as established in recent meta-analyses (Hoffman and Woehr, 2006; Kristof-Brown, Zimmerman, & Johnson, 2005; Verquer, Beehr, & Wagner, 2003).

Empirical findings clearly show that an increase in P-O Fit leads to an increase in job satisfaction, commitment, and retention (Kristof-Brown et al., 2005; Verquer et al., 2003). “Perhaps no other construct studied in organizational research has led so many scholars to draw the same conclusion and offer the same advice” (Wheeler, Gallagher, Boruer, & Sablynski, 2007,
p. 203). Despite close to two decades of research consistently supporting the positive outcomes with increased P-O Fit, the selection of senior executives in higher education and the position of college president have been neglected.

In the context of the employment experience, P-O Fit theory can be traced back to Schneider's (1987) Attraction-Selection-Attrition (ASA) framework that has served as the catalyst for research in this area (Cable & Judge, 1997). Within the ASA framework, Schneider (1987) posits that individuals are not randomly assigned to situations; rather people prefer environments in which they fit and seek out situations that are attractive to them. Organizations are more likely to select those potential candidates who appear to be the best match to the organization. If individuals find themselves in an organizational culture in which they do not experience a high level of fit, they will generally leave that environment. If they stay, they will be less satisfied and committed to the organization.

**Defining P-O Fit**

P-O Fit is broadly defined as the compatibility between people and organizations (Kristof, 1996). In the employee selection literature, P-O Fit is conceptualized as the match between an individual and organizational attributes (Judge & Ferris, 1992; Rynes & Gerhart, 1990). Four common elements prevail in the definitions related to employee selection: *supplementary fit* (when an individual possesses characteristics that are similar to existing organizational characteristics), *complementary fit* (when an individual fills a void or adds something missing in the organization), *needs-supplies fit* (when an individual’s needs are fulfilled by an organization), and *demands-abilities fit* (when an individual’s abilities meet the demands of the organization (Piasentin & Chapman, 2006). P-O Fit is a key element to
PERSON-ORGANIZATION FIT

maintaining an engaged and committed workforce that is necessary in competitive work

Most researchers broadly define P-O fit as the compatibility between individuals and
organizations (Kristof, 1996). Researchers clearly moved away from defining P-O Fit in the
1990’s, with sparse efforts to further developing the definition of P-O Fit in the 21st century,
which resulted in the majority of P-O Fit studies focused on organizational entry, outcomes, and
socialization associated with P-O Fit. Even though compatibility is not clearly defined, the
research can be divided into three main categories (Bretz & Judge, 1994; Saks & Ashforth, 1997)
based on the degree of congruence between: (1) an employee’s needs and an organization’s
systems and structures (Cable & Judge 1994; Turban & Keon, 1993); (2) an employee’s
personality and the organizational culture (Adkins, Russell, & Werbel, 1994; Bretz & Judge,
1994; Chatman, 1991); and (3) an employee’s personality and the organization’s climate (Bretz,
Ash, & Dreher, 1988; Burke & Deszca, 1982; Cable & Judge, 1994).

Authors do not explain why they classify their work as culture as opposed to climate.
Although not, both appear in the literature to be the same phenomenon from two different points
of view, but seem to produce similar results. Edgar Schein’s (1985) “Content and Levels of
Culture” approaches organizational culture through three levels: artifacts, espoused values, and
basic assumptions. Artifacts are located on the surface (what one sees, hears, and feels) and
visible products (language, technology, products, etc.); they are easy to observe, but difficult to
decipher. Espoused values are the organization’s strategies, goals, and philosophies. Basic
assumptions are unconscious and taken for granted beliefs, perceptions, thoughts, and feelings.
Schein describes these as the source of the organization’s values and actions that in return define
the culture of the organization.
The climate is the feel of the organization, the individual and shared perceptions and attitudes of the organization's members (Ivancevich, Konopaske, & Matteson, 2007). Although the culture is the deeply rooted nature of the organization that is a result of long-held formal and informal systems, rules, traditions, and customs, climate is a short-term phenomenon created by the current leadership. Climate represents the beliefs about the "feel of the organization" by its members. This individual perception of the "feel of the organization" comes from what the people believe about the activities that occur in the organization. These activities influence both individual and team motivation and satisfaction. Minimal empirical evidence justifies researchers studying one orientation over another as well as studying one aspect of fit to the exclusion of others; clearly fit is multidimensional (Bretz, 1993; Saks & Ashforth, 1997).

Kristoff (1996) defines P-O Fit as the “compatibility between people and organizations that occurs when at least one entity provides what the other needs or they share similar fundamental characteristics or both” (p.4) based on the premise that different types of people are attracted to different types of organizations. Value congruence has become “widely accepted as the defining operationalization of P-O Fit” (Kristof- Brown, Zimmerman, & Johnson, 2005, p.285). Westerman and Vanka (2005) posit that P-O Fit is grounded by the assumption that attitudes, behavior, and other individual outcomes result from the relationship between the individual and the work culture and does not result independent of each other. Values congruence between the individual and the organization achieved through the consideration of “cultural fit” in the employment selection process is central to P-O Fit.

Achieving a high degree of P-O Fit has been shown to have a positive impact on retention, satisfaction, and performance (Cable & Judge, 1996). According to Kristof (1996), incorporating multiple conceptualizations of fit and studying more than one aspect allows
researchers to capture a more comprehensive understanding of P-O Fit. “Increased accuracy in fit is crucial for recruiters to obtain the beneficial outcomes of person-organization fit” (Westerman & Cyr, 2004, p.252). Actual and perceived P-O Fit has been found to be predictive of organizational attractiveness and outcomes such as job satisfaction, identification, turnover, and commitment (Kristof, 1996; Saks & Ashforth, 1997; Van Vianen, 2000).

**P-O Fit Dimensions**

Researchers on P-O Fit have highlighted three dimensions of the employment experience that are influenced by person-organization congruence: organizational entry (job search, recruitment, & selection), outcomes (work-related attitudes & behaviors), and socialization (orientation, organizational social events & inclusion). These dimensions are tightly coupled with the four common definitions of P-O fit (supplementary, complementary, needs-supplies, and demands-abilities fit) as defined above. According to Kristof (1996), the three dimensions of the employment experience serve as the organizing principles for a P-O Fit research analysis because “1) Organizational entry is one of the primary influences in creating organizational homogeneity, 2) individual and organizational socialization practices have been supported as a second contributor to person-organization fit, and 3) long term outcomes attributed to person-organization fit include turnover, work attitudes, pro-social behaviors, work performance, and organizational outcomes” (p. 18).

The three dimensions: organizational entry, outcomes, and socialization, appear to be uncontroversial and the most frequently cited and accepted dimensions within the P-O Fit literature. The notion of P-O Fit rests on two principle assumptions (Kristof): first, that human behavior is a function of the person and the environment and second, that the person and the environment need to be compatible. The implication of these assumptions is that an
organization must have a single, homogenous and stable personality or character in order for employees to assess their compatibility with the organization and conversely. It follows that a success criterion for the concept would be measured in terms of a high degree of fit between employee and employer.

**Organizational Entry**

Research is sparse on the topic of P-O Fit and organizational recruitment. Dineen, Ash, and Noe (2002) are the only researchers to have explored P-O Fit and recruitment. They conducted an experiment that examined the provision of feedback to individuals regarding their potential P-O Fit with an organization was positively related to the individual’s attraction to that organization. The majority of the research has focused on the significance of P-O Fit in selection, rather than the recruitment process. Early research studies of P-O Fit were primarily experimental in nature and focused on current or graduating college students. Researchers were able to maintain control over extraneous variables while determining if P-O Fit influenced a job candidate’s job choice decisions. The organization entry studies have approached P-O fit research through quantitative methods with a focus on selection. The early experimental studies had limitations: researchers used hypothetical jobs and job choices, manipulated job attributes, employed discretionary metrics for measurement, and provided multiple artificial labor markets choices for participants.

Earlier studies found that organization employment choice, both by the employer and the prospective candidate, is influenced by the congruence between personal and organizational aspects (Rynes, et al., 1991; Cable & Judge, 1996; Rynes & Gerhart, 1990; Saks & Ashforth, 2002; Chatman, 1991). These findings support a unique difference in P-O Fit and general employability. Job applicants are most likely to be discretionary in not only what type of job
they choose to perform but also what type of organization they choose as their prospective employer.

Only one study used a mixed-research design, although it was weighted more heavily with qualitative methods (Rynes, et al., 1991). The objective of their study was to supplement the previous quantitative studies with a study using 41 graduating college students. The research uncovered the extent to which job applicants have negative impressions about an organization when delayed status updates are communicated or not communicated from the organization after the interview process. Candidates pursue other job opportunities if the delay is too prolonged. Poor recruitment (rude, obnoxious, and incompetent) practices by campus recruiters created negative impressions of organizations and resulted in organizations being eliminated for consideration by potential candidates. Rynes, et al. advised that future researchers should interview applicants earlier in the search process because their research uncovered in one-third of the cases recruiters were the major reason a candidate chose a particular company. In addition, candidates who accepted jobs stressed the importance of competent recruitment practices in securing applicants’ acceptances.

Thus, early research that focused on organizational entry found that individuals are attracted to jobs and organizational cultures that are in alignment with values similar to their own. The experimental studies provided valuable contribution to understanding P-O Fit; however they were not without limitations. The experimental studies supplied participants with hypothetical jobs and job choices. Researchers chose demand characteristics that determined the job attributes and chose which individual differences were measured. Contextual fidelity was another limitation as participants in the studies were sometimes given dozens of scenarios in one session. Perceived fit and attraction tested in hypothetical environments may not reflect actual
organizational needs and job search criteria, as the situations provided are less than authentic. Previous studies have not all measured fit consistently in the same manner or during the same period in the employment process (pre and post-employment) creating more complexity to the understanding of P-O Fit.

Research into P-O Fit moved from experimental studies to field studies in the early 1990’s. This change of focus away from experimental studies allowed the research to move from the assumption that P-O fit can affect a job seeker’s reactions to understanding the means by which actual job seekers and employees acquire and utilize P-O fit in the employment experience. Most of the field studies have focused on structured interviews with actual job candidates to determine the extent of values congruence between the individual and the organization. This research has focused on P-O Fit on the selection process by both the candidate and organization, however the recruitment process remains virtually absent in P-O Fit research. This absence is an important deficiency to note because an initial and basic strategic decision of an organization is to decide whether the recruitment process will be done by the employer or outsourced to someone else such as a search firm. Many of the studies, particularly in the early research, have focused on college students and recent graduates but have not addressed attraction, recruitment, or selection of senior executives or college presidents in higher education.

Outcomes

Organizations and managers expect a positive return on investment for energy and resources dedicated to organizational entry and socialization efforts, yet the literature is deficient on recruitment efforts and their associated outcomes. The majority of P-O Fit research is focused on the aspects of the employment experience and demonstrates positive employment
outcomes that result from a high degree of P-O fit (Schneider, 2001; Verquer, Beehr, & Wagner, 2002; Westerman & Cyr, 2004). “Long term outcomes attributed to person-organization fit include reduced turnover, work attitudes, pro-social behaviors, and work performance” (Kristof, 1996, p. 18). Thus, the research has focused on outcomes for individuals rather than on organizational outcomes related to P-O Fit. Organizational outcomes of P-O Fit have been the subject of limited research (Kristof, 1996; Schneider, 2000) even though the organization may indirectly benefit from the potential consequences of P-O fit.

The outcomes associated with P-O Fit studied have been focused on the employee factors of retention, job satisfaction, and job performance. Achieving a high degree of P-O Fit has been shown to have a positive impact on retention, satisfaction, and performance (Cable and Judge, 1996). Verquer et al. (2002) analyzed 21 studies between 1989 and 2002 exploring the relationship between P-O Fit and work-related attitudes to determine if P-O Fit predicted job satisfaction, intent to leave, and organizational commitment. Their meta-analysis shows that the intent to leave had the weakest overall relation with P-O Fit, while commitment to the organization was found to have the highest relation to P-O Fit. Further, individual-organizational values congruence was found to be more strongly related to all three outcome variables than goal and personality congruence. Thus, most employees tend to stay in an organization, experience increased job satisfaction, and stronger organizational commitment if the values of the individual and the organization are congruent.

Retention

The majority of the research on P-O Fit outcomes is focused on job satisfaction and commitment. There has been some attention given to the impact of P-O Fit on turnover. Employees with lower levels of “cultural fit” with their organizations are more likely to leave the
organization than those with higher levels of cultural fit. Several studies found that intention to quit was significantly impacted by P-O Fit. O’ Reilly, et al. (1991) found that “cultural fit” was a significant determinant of actual employee turnover within two years of the initial assessment as well as Chatman’s (1994) findings of “cultural fit” measured initially at entry to the organization and after one year of employment supported increased retention of employees. Similarly in 2001 Lauver and Kristof-Brown found that both Person-Job (P-J) Fit and P-O Fit had a unique impact on intent to quit the organization. P-O Fit was found to be a better predictor of intentions to quit the organization than was P-J Fit. Brigham, De Castro, and Shepherd (2007) further support the trend of outcomes research through regression analyses indicating lower intentions of managers to exit the organization when their dominant decision making style complimented the levels of formulation and structure in their firms.

We know very little about the potential implications of compensation plans implemented by employers and its impact on turnover. Cable and Judge (1994) found that compensation plans have a direct impact on job search decisions; however these affects are strengthened by fit between individual personality traits and compensation system traits. No research sheds a light on the impact of increased tenure and its relationship with increased P-O Fit. One would also assume that the external economic environment would have an impact as well. Further, the literature is silent on senior level executives, college and university presidents, and CEO’s in regards to P-O Fit and retention with or without the use of an executive search firm.

**Job Satisfaction/Organizational Commitment**

We know job satisfaction and organizational commitment are critical factors that impact an employee’s intention to leave the organization. Work attitudes such as job satisfaction and organizational commitment are some of the most frequently studied attributes of P-O Fit
research. The large number of P-O Fit studies using work attitudes as the dependent variable can be explained by a) it is easier to measure attitudes instead of behaviors, b) strong influence of notably cited work attitude theories such as Locke Range of Affect Theory (1976) and Schneider’s ASA Model (1987), c) greater occurrence of significant results in studies focused on P-O Fit and attitudes than other dependent variables (Verquer et al., 2002).

The only mention of CEOs and P-O Fit occur in the job satisfaction and commitment literature. Huang, Cheng, and Chou (2005) investigated the relationships among CEO charismatic leadership, P-O Fit, organization member satisfaction with the CEO, organizational commitment, and extra effort to work. Huang et al. found that P-O Fit functioned as a mediating variable influencing the effects of CEO leadership on the other variables. This study is the only example that provides insight into the influence of P-O Fit and the CEO.

We know very little about growth and development opportunities within an organization and their impact and influence on P-O Fit attributes such as job satisfaction and organizational commitment. Other indicators such as flextime and flexplace are worthy of investigation relative to critical aspects of job satisfaction and commitment (DeSanis & Durst, 1996; Fried, Litchfield, & Pruchno, 2003). A study of public sector employees suggested the importance of considering work-family balance, implying that work-family conflict, specifically, can result in an overall depletion of the individual's resources, due to a pile-up of demands from participation in one or more roles such as work or family (Biggs, Flett, Voges, & Alpass, 1995).

**Job Performance**

The research on individual’s job performance and P-O Fit is relatively undersized. Bretz and Judge (1994) found P-O Fit leads to higher levels of job satisfaction and career success
measured by salary and job level. The early research used subjective (self-reports) and objective measures (number of promotions & salary increases) of P-O Fit and job performance.

Recent research such as Haley and Sidanius (2005) proposed that P-O Fit and promotion might be linked based on socio-political attitudes. Socio-political attitudes reflect a preference for hierarchy attenuating institutions as defined by social dominance theory. However, Arthur et al. found P-O Fit is not a good predictor of job performance as the results of their meta-analysis of criterion-related validity of P-O Fit suggest that a much weaker relationship for PO Fit and job performance as they suggest that, compared to using PO Fit in entry-level selection; PO Fit is more useful in "employment related decision making, appointments to leadership positions, transfers, terminations, and even the formation of work teams" (p. 797).

No trends explain the limited research in the area of P-O Fit job performance literature or why researchers moved away from this aspect of P-O Fit outcomes studies. Arthur et al. validated Schneider’s (1997) characterization of the P-O Fit job perform literature stated over a decade ago “the overwhelming majority of research on fit has used various indices of individual affect as outcome criteria: adjustment, satisfaction, commitment, and turnover. Little of the research on P-O Fit has concerned productivity or other indicators of work performance. (p. 396). This lack of focus appears to be at odds with the fact that most employers will heavily consider past job performance as part of reference checks during the hiring process.

Socialization

Socialization is fundamental to P-O Fit and is defined as the process by which an individual acquires the attitudes, behavior, and knowledge needed to participate as an organizational member (Van Maanen & Schein, 1979). The amount and type of socialization practices offered by an organization to new employees tend to impact both their commitment and
intent to stay with the organization, which enhances an organization’s return on investments in recruiting, selection, hiring, and training (Kristof, 1995). However, as Bauer, Morrison, and Callister (1998) noted, “it is surprising that only a few studies have focused on how newcomers learn about and internalize cultural norms and values, particularly since socialization has been conceptualized as one of the primary ways in which organizational culture is transmitted and maintained” (p. 162).

Socialization as an element of P-O Fit did not appear in the literature until the early 1990’s with the work of Chatman (1991). Studying 171 entry-level auditors in large public accounting firms, Chatman explored organizational entry and outcomes in addition to socialization. She found that those who experience the most vigorous socialization fit the organization’s values better than those who did not. “Results indicated that socialization, particularly mentorship activities and attendance at firm-related social events, had positive effects on levels of P-O Fit within one year of organizational entry” (Kristof, 1995, p. 25).

Cable and Parsons (2001) found that employees experienced greater fit when organizations used highly institutionalized socialization strategies that were structured and planned activities designed by the organization to reduce ambiguity for employees. They posit that organizations that offer structured early work experiences reduce ambiguity; organizations that encourage employees to accept passively established roles reinforce the status quo (Ashforth & Saks, 1996). Conversely they posit that low institutionalized structured socialization strategies create ambiguity and encourage employees to examine and challenge the status quo.

Lindholm (2003) found the overwhelming majority of P-O Fit research to be quantitatively based with varying statistical relationships making it “difficult to identify subtle variations between individuals across organizational contexts” (p. 130). Thus, she approached
her research through qualitative methods because she wanted to investigate the causes and consequences of people’s experiences and behavior at work. Lindholm studied 36 faculty members at a public research university in order to discover how faculty constructs a personal sense of fit within their institutional culture. Her exploratory study found the majority interviewed assessed their fit within the institution and departmental contexts as relatively good overall. She posits that the organizational structures, visions, and missions of institutions of higher learning and businesses are fundamentally different. Due to the fundamental differences between institutional types, she questions the current knowledge we have gained from P-O Fit research exploring the employment relationship and its general applicability to institutions of higher learning.

The limited existing research on P-O Fit and socialization focuses on strategies used by organizations to socialize employees. We do not know the significance of an employee as an active participant and degree of willingness to engage in the organization’s socialization process. One would assume an employee’s reaction and willingness to socialization efforts would impact the success of an organization’s socialization strategies.

The majority of the limited research studies conclude that post-hire human resource strategies designed to increase social engagement such as mentorships, organizational social events, rewards, and other institutionalized socialization tactics create positive relationships between the employee and the institution and therefore enhance P-O Fit (Autry & Wheeler, 2005). If an organization effectively socializes a new employee and fosters congruence in the values, goals, or beliefs between the organization and the new employee, the new employee may exhibit greater organizational commitment (Cable, et al, 2001). In return organizational commitment often leads to reduced voluntary turnover (Myer, et al, 2002). “Thus, by
concentrating on P-O Fit during the early stages of employment, organizations can maximize the effectiveness of recruiting and selection systems” (Autry, et al, 2005, p.59).

**Summary**

P-O Fit research has advanced and evolved the industrial psychology study of person job fit, which focused on determining the necessary work knowledge, skills, and abilities in the selection process to P-O Fit and the employment experience. P-O Fit evolves from Schneider’s (2001) attraction-selection-attrition (ASA) model that posits work values are a core means by which individuals judge their P-O fit and individuals are attracted to and seek employment with organizations that exhibit characteristics similar to their own. Organizations tend to select individuals who are more similar to the organization. “Values are an important aspect of both individuals and organizations that can be compared directly and meaningfully (Cable & Judge, 1997, p.547).

Human resource and management professionals are responsible for the recruitment, selection, and hiring process for open positions within an organization. The P-O Fit research suggested that the focus should be hiring for the organization rather than a specific job (Kristof, 1996). Therefore, P-O Fit during the recruitment process evolves as a very critical component of job searches for organizations. The lack of literature during the recruitment process demonstrates the need for further studies in this domain and the importance of recruiters trained to communicate and explain an organization’s culture in a meaningful and effective way to job seekers.

Contemporary recruiting and job searches in the 21st century will demonstrate that serious job seekers are most likely to express as much concern about choosing the best organizational fit as they will determining the appropriate job for their career (Rynes and cable, 2003). Indeed, the
current recession and economy have affected the job market and hiring practices. Due to the current employment market many job seekers are happy to be hired for a job even though P-O Fit may not be at a satisfactory level for the potential candidate. However, executive and C-level positions such as CEO (including college Presidents) are less likely to be impacted by the current economic recession in regards to P-O Fit.

P-O Fit has been influential and has created a long line of studies exploring the P-O Fit and the employment experience. Despite significant advances in what has been characterized as a robust stream of literature (Pappas & Flaherty, 2006) and the previously discussed associated positive outcomes of P-O Fit in the employment experience, there are sparse studies examining CEO’s and senior management executives. We do not know why researchers have focused studies on entry-level positions in organizations and college students, rather than CEO’s and senior management executives in the business environment. Studies exploring the three dimensions of P-O Fit (organization entry, outcomes, and socialization), notably the recruitment process and executive search firms, do not explore the employment process of senior executives or college presidents in higher education.

**Presidential Search Firms**

University and college presidents play a critical role in guiding and directing institutions of higher learning. Contemporary college and university presidents face a host of challenges running small, medium, or large complex organizations with varying missions and competing constituencies. Critical to the success of the president is the transition to this leadership role. “Transitions are opportunities for organizations to look back and look ahead, to think about their environments and to respond by selecting a leader whose strengths match the new challenges” (Gilmore, p.6, 1988).
The higher education literature on selecting college and university presidents had early roots in the 1970's administrative literature that was driven by the Civil Rights Act of 1964 and focused on affirmative action and equal opportunity employment. The literature beginning in the 1980's to the present has shifted the focus towards institutional needs and discussion for finding the best and most appropriate candidates (Fisher, 1991). The quality of the president that a governing board is able to attract and retain is its greatest responsibility and its ultimate test (Kerr & Gade 1989; Nason 1982). In the higher education presidential selection literature three primary themes emerge: process, confidentiality, and presidential search consultants.

**Process**

The literature on the selection process for college and university presidents is centrally focused on understanding the process itself. Much of the writing is presented in the form of guidebooks and how-to-books. Nason’s (1984) seminal work *Presidential Search* is the foundation for the contemporary presidential search and the literature is written around the process. The nine steps are (1) establishing the machinery of search and selection, (2) organizing the committee, (3) formulating the criteria, (4) developing a pool of candidates, (5) screening candidates, (6) interviewing candidates, (7) selecting top candidates, (8) appointing the president, and (9) winding down and gearing up. All of this practical literature reinforces the governing board's roles and responsibilities in the selection process of college and university presidents (AGB, 2002; Bennis, 1971; Birnbaum, 1989; Bolman, 1965; Kaufman, 1974; McLaughlin & Reisman, 1990; Neff & Leondar, 1997; Weary, 1998).

**Confidentiality**

Attention is given in the literature to the sensitive nature of presidential searches and the institutions involved. Throughout searches governing boards find themselves faced with
challenges of confidentiality and disclosure. McLaughlin and Reisman (1990) stress confidentiality in order to support free discussions between the governing board and the search committee and to allow potentially interested candidates to remain viable whereas a public campaign would jeopardize their current positions.

"Sunshine" laws have also been the subject of this focus on confidentiality. Sunshine laws are those state laws that require public agencies, including public institutions of higher education to permit public access to their meetings and records. Although a Freedom of Information Act has been enacted in all 50 states, each state takes a different approach to how both laws interact and are enforced. States advocate both sides of this issue: some have legislation that allows candidate names to be excluded from mandatory disclosure and others do not (McLaughlin, 1983, 1985; McLaughlin & Reisman, 1989, 1900).

**Presidential Search Consultants**

The corporate sector has used executive search firms for most of the 20th century. Higher education's use of executive search firms can be traced to the mid 1970's with the formation of the Academy of Educational Development and Academic Search Consultation Service. The market has expanded to include approximately 15 major for-profit and non-profit executive search firms in addition to individual consultants and small boutique firms.

Executive search firms began to play a larger role in presidential searches as the selection process became more complex with influences of affirmative action, shared governance, and confidentiality from open meeting laws and new technologies further necessitating governing boards' consideration of professional presidential search consultants (Lingenfelter, 2004). The literature on presidential search consultants in higher education is sparse with a focus on rationale for selecting executive search firms, roles, and impact of executive search firms.
Personal-Organization Fit (Garrison, 1984; Kincannon, 1997; Lester, 1993; Lingenfelter, 2004; Rent, 1990; Touchton, 1989). Presidential search consultants in higher education "...at their best, lend speed, expertise, confidentiality, and objectivity to a search process" (Marchese, 1989, p.5).

The selection of a college or university president has a cultural context to the process. "The search process for a college and university president is an important ritual, a significant ceremony in the life of the institution" (Birnbaum, 1988), yet P-O Fit is absent in the presidential search consultant literature. The literature on the presidential selection process is comprehensive in terms of the process and methods. One gap in the literature comes about because much of the focus is on matching the presidential candidate with specific job criteria and institutional needs through the selection process. Person-Job Fit is an important concept that involves matching the knowledge, skills, and abilities of individuals with the characteristics of jobs (Edwards, 1991). Although matching the job responsibilities to the candidate's skills, knowledge, and abilities is a crucial component of the selection process, only limited discussion of the cultural aspect of the candidate and the institution is included in the literature. "It stands to reason that boards seeking a leader to hit the ground running need to look beyond academic credentials and conduct a more effective assessment of previous experience, willingness to learn, and institutional fit" (Kaufman, 2004, p.1).

Although Person-Job Fit is an important component of the selection process, institutions are becoming increasingly concerned about the congruence between people and the institution or P-O Fit because of its positive impact on retention, satisfaction, and performance (Cable & Judge, 1996). The literature briefly mentions that institutional fit is important; however only three empirical studies, which are primarily qualitative examining presidential search...
consultants, have been executed and contain no discussion of P-O Fit in their studies. Two of the empirical studies are unpublished dissertations.

Goldsmith (1989) was the first to study presidential search consultants. He studied the perceptions of four-year college and university presidential search committee chairs that had recently conducted a search engaging search consultants and those that did not outsource the search. Goldsmith found that 64% of the institutions retained a presidential search consultant. Private colleges and universities (60%) engage presidential search consultants more often than public colleges and universities (40%). Of the institution that retained a presidential search consultant, 52% of the chairs preferred that the consultant be used for all phases of the search.

Whether or not a college or university retained a search consultant Goldsmith found that both groups indicated preferred candidate qualities in the same order: developing community links, leadership experience in academia, fiscal and budgeting ability, outgoing personality, innovative, power of persuasion, doctorate, experience working with trustees and governing boards, record of vertical promotion, and salary in alignment with anticipated salary. Teaching experience was a delineating difference in the two groups. Boards at institutions that did not outsource the search process considered teaching experience more important (71%) than those Boards that worked with a presidential search consultant (54%).

Boards who retained a presidential search consultant reported that search consultants maintain an ethical search, ensure confidentiality, and increase efficiency of the presidential search process. Goldsmith determined that presidential Boards that retained a search consultant incurred a cost twice as much as those that did not in 1989. He points out the need for future research to determine the value-added by a presidential search consultant due the significant cost differential. A presidential search consultant could add value to the search process through the
exploration and congruence of P-O Fit between the institution and presidential candidate in the
recruitment process due to the associated outcomes such as an increase in job satisfaction,
commitment, and retention (Kristof-Brown et al., 2005; Verquer et al., 2003).

Judith McLaughlin and David Riesman are the premier and most cited researchers on the
college and university presidential search process. Their research has focused on the process,
confidentiality, open-meeting laws, and the use of consultants in the search process. Their
Carnegie Foundation funded study Choosing a College President: Opportunities and Constraints
(1990) resulted from a decade of qualitative research through case studies, document analysis,
interviews with trustees, faculty members, administrators, students, journalists, and consultants.
They also explored the questions of whether presidents matter and whether presidential searches
matter.

McLaughlin and Riesman recognize Birnbaum’s (1989) position that presidents do leave
a distinct mark on their institution and Cohen and March’s (1986) position that the position is
more symbolic than significant. McLaughlin and Riesman argue and their research supports the
notion that presidents do in fact matter. “We believe that there are a significant number of
presidents who do change the course of colleges or universities they head. Many more
presidents affect, for better or worse, the lives of the individuals with whom they have worked”
(p.4). Furthermore, they recognize the work of Clark Kerr (1984) and Marian Gade (1986)
supporting the point that presidents do matter and that the process by which they come to office
impacts the success or failure of the presidency.

The Carnegie Report (McLaughlin & Riesman, 1990) explores the presidential search
process through five case studies of searches from different institutions of higher learning. Most
notably was the 1983 University of Florida presidential search case study. University of Florida
conducted the presidential search with open-meeting laws. The scenario repeated with the resignation of John Lombardi at a University again in 1999. The University of Florida case study displayed how every step of the presidential search process was conducted with the news media present. The five cases highlight the need for competent individuals to handle the search process whether conducted internally or externally through an executive search firm.

McLaughlin and Riesman (1990) found the following types of consultants that are retained for presidential searches: “not-for profit search firms, corporate search firms with sidelines, not-for-profit work, small specialty firms, and individuals who regularly or occasionally take on search consulting” (p.227). They were interested in why corporate executive search firms would enter the higher education market. Presidential searches take longer, have more candidates to consider, and generate far less revenue because search fees are calculate on the first year of annual earnings and CEO pay is typically higher. Their research determined that higher education searches create contacts, prestige, and institutional advertising for corporate search consultants. In addition, many trustees serve on corporate boards and may reference the consultant in a corporate search based on their experience in the higher education search.

An interesting aspect of their research is the discussion of hazards in using a presidential search consultant. They found some potential hazards to be the individual consultant’s background, attitude, biases, and conflicts of interest. The background of the search consultant whether corporate or higher education can influence how a consultant or consulting firm approaches the process and how they are perceived by the search committee. “Faculty members often view corporate search firms as belonging to the trustees’ world rather than their own” (p. 252). The governance structure is very different in higher education than in the corporate
business world and can present challenges and frustration to corporate search consultants due to this very political and dynamic environment.

McLaughlin and Riesman subscribe that effective and successful search consultants in higher education are “like anthropologists, quickly sizing up its place, its values and mores, then using this same perspective and judgment in evaluating candidates” (p. 253). In addition, they found situations where consultants had met future candidates at networking events and conferences. These social interactions leave impressions, either positive or negative. If the consultant allows these biases to influence s decision on a candidate potential legal implications may arise due to professional bias. When a search firm places a candidate typically there is a clause for a defined period of time in the search agreement prohibiting the search firm from recruiting the placed candidates for other positions.

One notable point is the authors’ interest in organizational culture. McLaughlin and Riesman are the only researchers to introduce a cultural aspect to the presidential search consultant literature and set the foundation for discussion of P-O Fit. As they layout the process in a linear sequence, their approach does not allow for the cultural aspects of the process to be captured, therefore McLaughlin and Riesman dedicated a chapter The Multiple Meanings of Searches to viewing the presidential search process through a different lens. They employ Bolman and Deal’s (1984) four frames of an organization as their conceptual framework for viewing the presidential search process in this chapter. The four frames are structural, political, human resources, and symbolic with the authors’ adding their own fifth frame of moral. This conceptual framework allowed them to highlight important aspects of the process and understand more fully its multiple dimensions and implications.
The structural frame allowed the researchers to delve into what structural processes in the search result in the best positive outcomes such as careful consideration of the process, planning, implementation, and execution that can improve the processes of presidential selection. This approach also points out the limitations of structural approaches where often proposed strategies result in political concerns such as a faculty member suggesting an African-American trustee be named to the search committee with the intent to show positive intent to recruit minorities. The trustee chair rejected the proposal because an additional trustee, regardless of ethnicity, would shift the balance of power to the trustees. Problems arise when the structure does not fit the situation. This structural misalignment introduces the political frame and the authors use the 1983 University of Florida case outcome as exclusively political whereas power and conflict rise to the surface. Problems arise when power is concentrated in the wrong place or when so broadly dispersed nothing gets done.

The human resource frame is focused on people, individual needs, and motives. It assumes that social systems work best when needs are satisfied in a caring, trusting work environment with shared decision making focusing on commitment and involvement. The presidential search touches many people such as the search committee, top administration that reports to the president, and sometimes the finalists who did not get the job. The authors share the Rice search committee chair’s ability to understand the individuals of the committee as well as the group dynamics through a retreat prior to the search. This pre-retreat meeting resulted in the committee members going into the retreat as 12 individuals and coming out a committee and coalesced as a team focused and committed on the leadership needed for Rice University.

The symbolic frame centers on attention to culture, meaning, belief, and faith. Symbols govern behavior through shared values, informal agreements, and implicit understandings.
Symbols are also found in the form of stories, heroes, metaphors, rituals, and ceremonies. Early in the search process the symbolic frame helps identify the behavior of many search committees that goes into developing the ad and job description of the president. McLaughlin and Riesman found that these documents are developed but often are never referenced. Thus, these activities tend to be symbolic in nature. The list of job accountability and campus visits are important campus rituals. So while the symbolic frame is helpful in examining the process of presidential selection it is also helpful in looking at the person chosen as a symbolic change agent when a new change or direction for the college or university is needed.

McLaughlin and Riesman add a fifth moral frame “which is an occasion during which passionate ethical convictions and ideological ones are in contention” (p.341). In the Abbott College presidential search case strong conflicting opinions about the current college president existed between trustees and faculty. Faculty members debated whether or not to leak to the press a memo that would negatively impact the current college president’s chances of maintaining his position. In this frame the “urge to do what is practical and expedient often has to be disguised in order not to be labeled” (p.342). The process can be very subjective as to what is fair and open to one may not be to another and may be conflicting with the process that may produce the best outcomes.

“The process of choosing a college president is interesting to those who participate in it, observe it, or study it because of its multiple meanings” (p.343). Although McLaughlin and Riesman make no mention of P-O Fit specifically in their research, they imply that organizational culture plays a critical role in the selection of colleges and university presidents from the lens of search consultants in higher education. Their work exposes the gap and need for
future research exploring the extent of interplay of P-O Fit and search consultants with presidential search process.

Tronas (1991) studied the use of presidential search consultants for 15 community colleges in California. Through primarily qualitative methods he studied the roles and impact of presidential search consultants and trustee satisfaction with consultant searches. Tronas argues that the quality of a search’s outcome is dependent on the quality of the process. His research provided new information and insight to community college trustees in order for them to be able to make more informed decisions in presidential searches.

Tronas builds on Goldsmith’s recommendation to study value-added effectiveness of presidential search consultants. He achieves this through further exploration using perceptions of satisfaction as the metric. Tronas explored (1) roles that presidential consultants were hired to perform and the roles that consultants indicated are ideal; (2) impact of perceptions held by consultants and trustees; and (3) level of satisfaction with the performance of consultants indicated by the trustees.

Tronas states four reasons for hiring a consultant: (a) knowing the search process, (b) recruiting knowledge and experience, (c) creating wide networking contacts, (d) developing awareness of search and selection pitfalls. He also states six reasons for the increased use of consultants: (1) increased president turnovers, (2) recognized importance of the search process, (3) perceived that search process skills are important, (4) inexperienced search committee members; (5) related president search issues to shared governance, (6) committed time as presidential searches are very time consuming and more time than most search committee have to give. He also developed five roles of a consultant: educator, advisor, facilitator, chairperson, and equal participant.
Tronas tested these developed roles as to consultant’s usual role and ideal role. We know from his research that a consultant’s role is to serve the search committee and its process rather than direct or fully participate in the search process. He found that consultants impact (1) the search process (86% of respondents found consultant impact on the process significant), (2) the quantity of applicants (83% of respondents found consultant impact positive on quantity), (3) the quality of candidates (81% of the respondents found consultants delivered a higher quality pool of candidates), (4) the candidate pool diversity (76% of the respondents found consultants positively impacted the diversity of the candidate pool), and (5) the campus climate (77% of the respondents found a positive impact on climate by consultants) (p.7-8).

Tronas’ research is based on a small sample that focused on two-year public colleges from the state of California. We do not know what the impact of consultants would be for four-year public and private colleges and universities nor do we know the extent that P-O Fit is applied in the presidential search consultant and search process.

Summary

The three empirical studies in the presidential consultant search literature have utilized primarily qualitative methods. They point out advantages and concerns with using presidential search consultants, however clearly we know very little about consultant effectiveness and differences among consultant types. No empirical research has been conducted to compare for-profit and not-for-profit search firms to challenge or affirm McLaughlin and Riesman’s findings. The literature suggests that search committees and governing boards interview a number of search firms before selecting a finalist. The interview and evaluation of search consultants allows college and universities to engage with a particular search firm based according to their needs and the right fit (Lingenfelter, 2004). A qualitative study that examines the extent that
presidential search firms consider P-O Fit in the recruitment, selection, and hiring process would highlight and provide search committee’s additional insight to make better informed decisions in selecting one type of consultant versus another based on their recruitment philosophy and desired outcomes. Search consultants are believed to be helpful “in providing a realist sense of who is out there to be discovered, scrutinized, courted, and persuade and provides ‘Good Housekeeping’ seal of approval” (p. 226).
Chapter 3
The Research Design

With 15 years of personal human resource experience, I have watched executive search firms operate in the business world and have experienced their services as a client for over a hundred searches for staff, supervisors, directors, executives, vice presidents, and physicians. I reviewed the search agreements between two national executive search firms that specialize in physician recruiting with my organization within the last year looking for P-O Fit consideration or the discussion of organizational culture. I found several characteristics in this analysis.

Search firms work for the client institution. They are engaged by an institution for a presidential job search and hired at the time a search agreement contract between both parties is signed. The search firms must gather enough information about the institution to apprise potential candidates about the job opportunity and the institution. The search firm GetaJob\(^1\) specifically mentions that their site visit at the client’s corporate headquarters will consist of a four dimensional perspective upon which the search firm will assess the job opportunity and organization: security, credibility, desirability, and financial competitiveness. A professional service firm, such as a physician practice, must have competent physicians and clinical services and programs that are needed internally to the organization and externally in the community and demographic population, which in return create a more secure position opportunity. Credibility is the reinforcement that a practice exists for the physician and not merely a potential for a practice that has not been developed strategically. Desirability addresses the concern of geographic location of the practice’s operations and the candidate’s desire for certain relocation areas. Financial competiveness explores the market pay equity for the position in the market place.

\(^{1}\) The names of both firms are pseudonyms.
Furthermore *GetaJob* states in their agreement between the organization and the client that when candidates evaluate opportunities, they consider three main components in their decision: financial compensation, location, and quality of life/quality of the practice. Although quality of life could potentially explore some P-O Fit related attributes, typically this discussion revolves around work hours required by the position and how much vacation is offered by the organization.

The search firm *SnagaJob* proposed interviewing client-specified decision makers on-site, marketing the position, presenting candidates who meet a position description provided by the client, checking references, and preparing the candidates and spouses or significant others in the interview process. Both search firms requested a list of previous candidates sourced by our organization, however there was no discussion about the candidate’s profiles. Therefore, the search firm did not know the reasoning behind why we proceeded with some candidates and did not for other candidates. Potentially this would be an opportunity for the search firm to gleam some insight to cultural and P-O Fit aspects of the search. Search firms may be missing an opportunity to explore cultural aspects of the organization and cultural fit of the candidates. If a search firm researched the reasoning behind why the organization selected some candidates and not others through the organization’s own recruitment efforts prior to engaging an executive search firm, there may be cultural learning that could occur from that exercise.

Holistically the agreements covered very similar elements. Both firms specifically state in their search agreements what the search process will include during the site visit with the client gathering organizational demographics and reviewing and assisting in the creation of the job description. Additionally, each search firm states in their agreements with the client the
compensation package, the candidate guarantee period, the professional fees charged, a committed decision-making process, and a desired timeline by the client for having the position filled. Neither search firm mentioned P-O Fit consideration or any type of organizational culture assessment in the agreement letter directly or indirectly as part of their collection of information and site visit with the client.

The Conceptual Framework

Given the 20 years of research in this area, we know that P-O Fit is related to positive outcomes such as an increase in job satisfaction and commitment as well as reduced turnover. We also know that the average tenure for a college president is 8.5 years (ACE, 2007). ACE found the sharing of information during the recruitment and selection process of college and university presidents plays a critical role in the success or failure of a college presidency. One in five college presidents reported they did not receive a realistic assessment of the institution's status during the search process; 25% had not received a full and accurate disclosure of the finances; 20% did not understand the institution's and board's expectations; and 25% did not clearly understand their spouse's role upon accepting the job. Presidents of private colleges experienced the most difficulty obtaining information about their institutions prior to accepting the position. Twenty-four percent of the presidents at private institutions had not received a realistic assessment of the institution's current status, compared to 17% of the presidents at public colleges (ACE, 2007). Obviously, search firms are not conducting the most effective searches. Therefore, the search process conducted by the executive search firm was the ideal intervention point for P-O Fit consideration.

---

2 If the candidate does not work out in the first six months the search firm will replace without any additional fees.

3 These are internal steps that the organization will take to get to a final decision on candidates.
The board of trustees, working with faculty, creates the search committee structure and defines the charge of the committee. This type of committee structure provides an opportunity for shared perspectives and broader understanding among the various constituents creating a sense of unity to accomplish the goal of finding a president, who is qualified to serve as both chief academic officer and the chief executive office of the institution (McLaughlin & Riesman, 1990).

McLaughlin and Riesman (1990) state the committee charge is formulated by the board, in consultation with other constituents, and reflects the role of the board in making the selection of the president and defining the terms and condition of the appointment. The charge also will set forth criteria such as search committee membership, statement of presidential leadership qualities, breadth of search (regional or national), expectations regarding use of search consultants, number of candidates to be recommended to the board for the final decision, and date by which the board expects recommendations of nominees. It is unclear if and how executive search firms play a role in the formation of the institution’s presidential search committee.

Executive search firms typically follow a normative process when engaged by a client organization for a search. The initial step is the client meeting where the search firms gathers information that will be used for the search process and development of the search agreement. The search firm outlines the search requirements, general compensation for the position, timelines, current and future organizational strategy plans, and general demographic data of the organization. This meeting is usually followed up after the agreement is signed by both parties by an on-site visit that involves identifying key opportunities for the new executive, developing
and defining a candidate profile that fits into the organizational structure, and meeting and interviewing key client executives involved in the process.

The search firm then will create an executive job candidate profile and conduct a market analysis that will outline the competitive environment for candidates and market value for the position. The search firm and client then must settle on an agreed upon job description that contains information about the job, responsibilities, key opportunities, and required skills, knowledge, and abilities for the position. A competitive compensation package is also a major part of this deliberation.

The sourcing of candidates through the search firm’s search strategy includes generating a list of potential candidates based on the job specifications. This activity is achieved through combing databases, networking, “tapping” contacts, searching Internet sources, and engaging advertisements to attract active and passive job seekers. Once the initial list of potential candidates is developed the search firm will begin qualifying candidates via job experience and credentials and determining viable candidates through more in-depth analyses such as telephone screening and collection of individual self-profiles.

Depending on the market, search firms may initially start off with 10-25 candidates for the client that they feel are viable as they best match the job description. The search firm first checks the qualifications of the candidates on their list through in-depth interviews and candidate background and reference checks, as well as determines the interest in the position, and the feasibility of relocation if applicable. Typically the search firm will work with the client via telephone screens and interviews to narrow down the list to the three to five candidates who will be the finalists for the position and invited for a campus visit. Through these processes the search firm works with the client to help determine strengths and weaknesses of the candidates.
Often an institution may have an open search whereas nominations and self-nominations are accepted by the institution and need to be incorporated into the screening process. The search committees tend to conduct many extended meetings and may shape the search consultant's perspective of the culture.

The client will select their candidate after campus visits and final interviews and make a job offer. Sometimes the search firm will work as a mediator during the negotiation process and will work with the selected candidate and client to help them transition from their current situation to the new job and organization. Typically the search firm will stay in communication with the client and the candidate after they are placed with the organization to help ensure satisfaction for both parties. This continued communication is of special interest to the search firm as most agreements have a guarantee period for candidates placed and want to be apprised of any potential issues that may have arisen so they may be proactive.

Ideally, executive search firms would include organizational culture and P-O Fit consideration as they seek potential presidential candidates and as they screen, assess, and present finalists to the client institution. The inclusion of organizational culture and P-O Fit could allow executive search firms to present presidential candidate finalist that might be a better cultural fit with the institution. Yet, in the sequence of search events, neither P-O Fit nor the concept of culture appears to be normative. Thus, I offer a model for an executive search process that included consideration of P-O Fit and culture that enabled me to assess the current state of executive searches (see figure 1). In other words, the green section of the figure represents the normative search process; while the blue sections are conceptually what I suggested should be the cognitive part of the process.
Deal and Kennedy (1982) define organizational culture as "the way things get done around here" (p.4). Culture influences the organization's decisions, actions, and behaviors. Culture is an organization's ideas, values, attitudes, and beliefs guide the way in which employees' think, feel, and act (Schein, 1982). Therefore, understanding culture is fundamental to the description and analysis of this phenomenon especially the P-O Fit construct of organizational culture.

Deal and Kennedy's Cultural Elements provided a foundational pillar for my conceptual model of an Executive Search Firm's P-O Fit Process. "The idea of corporate culture is too important to the effective functioning of today's corporations to be dismissed as a fleeting craze. Culture is the glue that holds an organization together" (p.22). The cultural elements outline the critical components of a strong organizational culture: business environment, values, heroes, rites and rituals, and the cultural network. Their seminal work found that those organizational cultures that express a shared values system, which are the fundamental beliefs, concepts, and principles that underlie the culture of the organization, and sense of purpose tend to outperform those organizations whose goals are expressed as quantitative targets.

I was most interested to what extent and how executive search firms assess an institution's organizational culture and how that information is utilized and applied during the
Figure 1 Executive Search Firm P-O Fit Process

Note: Model includes Deal and Kennedy Cultural Elements (1982)
recruitment and selection process of the client’s presidential candidates by the search firm. Deal and Kennedy found that “surprisingly much can be learned in a limited amount of time about a company’s culture. How? The process begins at the surface and then inward toward the company’s unconscious” (p.129).

Deal and Kennedy’s five cultural elements of business environment, values, heroes, rites & rituals, and the cultural network served to organize my study and give me insight into the search firms’ “unconscious.” The elements assisted in determining to what extent executive search firms assess the client institution’s culture and apply that knowledge to assess P-O Fit with potential presidential candidates. The variables identified below are general and were explored with the firms, as they were applicable to their clients.

**Business Environment**

The business environment is the scope of the culture that leads to specific cultural styles. It consists of the external variables in the higher educational environment such as government legislation, economy, and competition that determines what an institution has to do to be successful. These variables will differ somewhat with the institutional type of the firm’s clients.

**Values**

Institutional values are the beliefs and assumptions that an institution holds to be true and uses as guiding principles for managing and running the institution’s everyday business. They collectively drive decision making within the institution and are the heart of the institution’s culture. The institution’s values reflect how the faculty, administration, and staff of the institution collectively behave, how they conduct their business, and what they believe are the true measures of success. When they are faced with a problem, institutional leaders invariably make decisions that reflect their organization’s values.
Heroes

Heroes are the people within the institution who personify the institution’s values; they are the achievers who provide role models for success within the institution. Heroes “Walk the Talk.” They are successful individuals who stand out in the institution by performing in line with the institution’s value system. Heroes show others that to be successful one upholds the values held by the institution. Heroes are used as an example for new people in the institution to clearly show how to behave if you wish to succeed.

Most heroes in institutions are at or near the top of the institution’s hierarchy. They are the people that other institutional actors view as the most successful. Heroes typically are leaders in the institution because they set the expectations of what we want the rest of the campus to accomplish at work. Although others are successful within the institution’s culture, there still may be reasons why they are not anointed as heroes. Heroes truly are more than just successful people within the culture but also have a style of leadership that others feel comfortable adopting.

Rites and Rituals

Rites and rituals are ceremonies and routine behavioral events that reinforce the culture. Rituals are “how things get done around here” (Deal et.al, 1982, p.), and rites are a higher level of rituals. They are the events that reinforce appropriate behavior.

A rite is an institution ceremony or event that reinforces the rituals. Rites can cover a large spectrum of an institution’s events. They include performance reviews, training, conferences, in-service, service and recognition awards, and department and group meetings.

A ritual is a transparent day-to-day institutional work practice that is accepted as how work is performed within the institution’s culture. Rituals are taken for granted because they are
an integral part of what the jobs are and how the jobs are done within an institution. Processes outside of the accepted rituals are considered alien in the institution. When rituals are repeated on a daily basis they become an accepted part of how business is conducted within the institution. Over time they become transparent to those who follow them.

The Cultural Network

The cultural network is the primary and informal means of communication that work behind the scenes to pass information, spread gossip, and influence behavior within the institution. This network provides the means for sending the values and institutional folklore throughout the institution and is an essential way in which staff understands what is going on around them.

The cultural network as explained by Deal and Kennedy (1982) includes several normative roles. Story tellers promote the culture through stories that explain and give meaning to everyday events within an institution. The keepers of faith mentor others by protecting the values of the culture. Whisperers are passers of information behind the scenes. Gossips are the day-to-day communication system. Spies are passers of sensitive information to those who may or may not need to know. Symbols are mechanisms for conveying what and who is important, and language is the terminology that describes what is done and how often.
The conceptual framework was dependent on the integration of the cultural elements and P-O Fit (Figure 2). Kristof (1996) operationalized the P-O Fit construct: values congruence, personality congruence, and work environment congruence, however few studies have incorporated all three constructs. Westerman and Cyr (2004) found that values and work environment congruence were both related to job satisfaction and organizational commitment and furthermore values, personality, and work environment were related to an employee’s intent to remain with the organization. Their work suggests a multidimensional model of P-O Fit.

Values congruence is the relationship between fundamental characteristics of people and institutions. Kristof defines values congruence as the compatibility between people and organizations and is the most commonly studied aspect of P-O Fit. We know that values are a significant component of organizational culture as they guide the staff’s behaviors (Schein, 1992). Individuals use values to make choices including their involvement in institutions they choose for employment. Personality congruence is the match between characteristics of individual personality and organizational culture, sometimes described as organizational personality. This occurs when current staff members have a personality “profile” of the ideal successful staff member of the institution upon which others are judged for personality fit. For
example, a ruthless bottom-line executive would not fit within a collaborative, socially responsive company. Personality congruence has roots in social identity theory in that individuals actuate their self-concepts through choosing membership in organizations and associations of similar individual. Personality congruence has been found to be significantly correlated with employee satisfaction and organizational commitment (Verquer, Beehr, & Wagner, 2003).

Work environment congruence is the match between individual preferences or needs and organizational needs and systems and is often referred to a needs-supplies fit. This perspective posits that work motivation is maximized when individual characteristics fit institutional environments. For example, a staff member is able to offer time and effort for an important project the organization has to launch in order to sustain its competitive advantage. Bretz and Judge (1994) found higher levels of satisfaction and organizational commitment when individual characteristics fit organizational environments.

Figure 3 illustrates the integration of the elements of culture and P-O Fit. The matrix shows the elements of culture and P-O Fit that overlap (shaded cells) and bring together both concepts into the conceptual framework. Thus, the established integration and relationship of both elements set the stage for exploring executive search firms’ consideration of P-O Fit in the search process for college and university presidents for this study.
Figure 3 Institutional Cultural Elements and P-O Fit Integration

<table>
<thead>
<tr>
<th>Cultural Elements</th>
<th>P-O Fit Elements</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Values Congruence</td>
</tr>
<tr>
<td>Business Environment</td>
<td></td>
</tr>
<tr>
<td>Values</td>
<td></td>
</tr>
<tr>
<td>Heroes</td>
<td></td>
</tr>
<tr>
<td>Rites &amp; Rituals</td>
<td></td>
</tr>
<tr>
<td>Cultural Network</td>
<td></td>
</tr>
</tbody>
</table>

I assumed, therefore, that executive search firms have ample opportunities to learn more about an institution's culture and develop an institution cultural profile based on the Executive Search Firm P-O Fit Process. I also assumed that once the institution's cultural profile was developed it could be utilized to enhance the current recruitment activities and the selection processes used by the executive search firms. Thus, we can say the search firm would present college and university president finalists to the institution that are not only a good "fit" based on job competencies but also on organizational culture resulting in improved P-O Fit.

Methodology

The research question was of special interest to me because of my human resource experience and teaching background. Organizational studies have always created intellectual curiosity for me especially in the realm of organizational culture. I have personal beliefs and made sample choices that influenced my decision to study this topic in the ways that I proposed.

From my personal experience with executive recruiters in the business field, I have never had a discussion about P-O Fit; however P-O Fit is informally discussed among managers in
organizations. In my experience I have found that "fit" is raised during the selection and hiring process. However, the expression is generally pointed: "I do not think Bill or Sally would be a good fit for our organization." In my experience, when this discussion does occur it has not been followed any systematic or structured assessment of "fit." Instead a consensus is reached informally as to whether the candidate is a good fit or not with no further dialogue exploring why or why not. Often the decision is made in conjunction with P-J Fit as to whether the candidate should continue in the interview process, be hired, or released from further consideration.

The primary goal of this study was to advance what we currently know about P-O Fit through the lens of executive search firms conducting college and university presidential searches. The conceptual framework (see Figure 2) of this qualitative study was centered on organizational culture, which is the shared values, beliefs, and norms within an organization, and is the foundation from which P-O Fit emerges. "Qualitative research is an approach rather than a particular set of techniques and its appropriateness derives from the nature of the social phenomena to be explored" (Morgan & Smircich, 1980, p.491). The problem of this study was to determine to what extent executive search firms that specialize in presidential searches in higher education considered and used P-O Fit in the recruitment and selection process of public and private college and university presidents through a qualitative multi-case study perspective.

Case study as a research strategy is appropriate when a "how" or "why" question is being asked about a contemporary set of events, over which the researcher has little or no control (Yin, 2003). A case study is defined as an "empirical inquiry that investigates a contemporary phenomenon within its real-life context, especially when the boundaries between the phenomenon and context are not clearly evident, and when multiple sources of evidence are used" (Yin, 2003, p.13). Yin (2003) presents four applications for case study strategy:
explaining complex casual links in real-life interventions, describing the real-life context in which the intervention has occurred, describing the intervention itself, and exploring those situations in which the intervention being evaluated has no clear set of outcomes which were all applicable to this study. While all apply, the most important is to explain the presumed casual links in real-life interventions that are too complex for the survey or experimental strategies. In executive search recruitment, the explanations link executive search recruitment processes for college and university presidents with P-O Fit effects.

Case study is an appropriate methodology when a holistic, in-depth investigation is need (Feagin, Orum, & Sjoberg, 1991) such as in this study. Case studies have been used in varied investigations and researchers such as Yin (2003) have developed robust procedures. When the procedures are followed, the researcher will be following methods as well developed and tested as any in the scientific field. Case studies are designed to bring out the details from the viewpoint of the participants by using multiple sources of data (Tellis, 1997).

The focus of this study was to discover the extent that executive search firms in the recruitment and selection process of college and university presidents consider P-O Fit. Case study was appropriate and selected for this study because the researcher had the desire to understand a complex social phenomena (Yin, 2003). The case study method allows researchers and investigators to retain the holistic and meaningful characteristics of real-life events such as organizational culture and executive search firms recruiting college and university presidents. As a researcher, I asked a series of questions to executive recruiters pertaining to P-O Fit and the recruitment and selection process of college and university presidents. From those questions, I gained insight into a unique construct of organizational culture; P-O Fit, and a unique population
of executive search firms who specialize in college and university presidential searches. It is hopeful that this study can be used for further exploration by other researchers.

**Design of the Study**

I interviewed the Principal, CEO, or President and search consultants with 6 executive search firms that specialize in college and university presidents as identified by ACE. The ACE Executive Roundtable has 30 executive search firm members. A query of the executive search firms that specialize in presidential searches resulted in 10 possible executive search firms to interview. The search firms contacted represented firms in the following geographic locations: District of Columbia, Arizona, Florida, Ohio, Georgia, North Carolina, California, and Illinois. The number of professionals in the executive search firms represented geographically range from 2 search consultants in the smaller firms to 83 search consultants in the larger firms.

The executive search firms for the study were all members of the ACE Executive Roundtable, engaged in presidential searches, and were easily accessible through the ACE database query and therefore resulted in homogenous sampling. Homogenous sampling is a selection process that focuses on a particular unit or subgroup that is considered homogeneous (Gall, Gall, & Borg, 2003). In the case of this study the sample was homogenous because the executive search firms that were contacted for the study all conduct college and university president searches.

I utilized the “snowball technique” (Patton, 2003) to help facilitate the number of study participants in each executive search firm for the study. During my initial contact with the executive search firm, I encouraged them to refer me to other individuals in the firm who might be willing to participate in my study, creating the snowball technique.
From the Principal, CEO, or President of an executive search firm I sought an articulation of the philosophy of the search firm and the characteristics that make their search firm successful. The search consultants are the frontline professionals who perform the searches. From them, I sought the mechanics of the search process as conducted by their firm.

I sent a letter to the Principal, CEO, or President as applicable of each of the 10 executive search firms communicating the purpose of my study and the desire to have their firm participate (Appendix A). It was my hope to interview 30 executive search professionals from small and large firms to participate in the study. Ideally I wanted to interview the Principal, CEO, or President as applicable and other search consultants within the firm.

I wanted to achieve my study's sample of 30 participants by selecting three search firms representing the smaller firms and three search firms representing the larger firms from different geographic locations. Smaller firms were defined as those firms that have less than 12 search consultants and the larger firms were those that have 12 or greater search consultants. I proposed to interview up to five people in each search firm; the five included the CEO and two senior and two junior search consultants.

To invite the participants for the study I mailed out the participant letters (see Appendix A) and placed a phone call to participants after 10 business days to discuss the study, answer any questions, and determine if they would participate in the study. I had all interviews scheduled with those willing to participate by the end March of 2010. The timeline once the interviews were scheduled for the data collection required 90 days to conduct interviews and verify the information with the participants prior to data analysis.

The Human Subjects proposal was sent to the Protection of Human Subjects Committee at The College of William and Mary immediately following the proposal defense and was
approved. No informants were involved in the study prior to the completion of the IRB review. All informants signed a consent form prior to participation in the study (Appendix B).

The interview questions were developed based on the conceptual framework and specifically addressed the elements in the matrix in figure 4 (see Appendix C). The questions were designed to draw the participants toward reflection of their experience of executive search firms for college and university presidents and its implications for practice. The questions were also designed as probes to encourage participants to dig deeper and reflect on the meaning of the search experience. "The process begins at the surface and proceeds inward, towards the company's unconscious" (Deal and Kennedy, 1982, p. 129).

The questions were designed to explore and elicit the cultural aspect and meaning of presidential searches through the lens of an executive search firm. It was my goal to explore the extent that executive search firms consider the business environment, values, heroes, rites & rituals, and the cultural network and personal, values, and work environment congruence using these elements as a guide for the interview questions. The interview protocol was divided into two sections, one section of interview questions was intended for the Principal, CEO, or President of the firm alone and the other section was intended for the Principal, CEO, or President as well as the search consultants of the firm. Due to the nature of the questions the Principal, CEO, or President was best suited to answer all the questions whereas the search consultants were better suited to answer questions more directly related to the daily operation of the search firm and the search process.

In order to understand the effectiveness of my ability to explore the consideration of P-O Fit by executive search firms in college and university presidential searches, the interview questions developed were pilot tested prior to the interview process. A colleague, who has
executive recruitment experience, agreed to allow me to interview him to test and review my protocol. The purpose of the pilot test allowed me to strengthen my interviewing techniques, make sure the questions were clear and compelling, and ensured that my time spent with each study participants was as effective and efficient as possible. Upon completion of the pilot test and feedback, I modified the interview schedule as necessary and was ready to use the interview questions with the study participants.

Data Collection

My research study focusing on executive recruiters who specialize in college and university presidents required a thorough and in-depth interview with each of the research participants. I believe that this approach did result in more trustworthy and authentic results, since there was individual attention paid with each of the participants. Rossman and Rallis define a trustworthy study as being competent and ethical. An authentic study is one that treats the participants well and benefits them in some manner (Dimock, 2001). As such, I developed interview questions and an approach that allowed me to extract the amount of information that was needed for a comprehensive investigation.

Rossman and Rallis (2003) suggest using a structured interview format when the participants are located at multiple sites, as in my study. A structured interview format is characterized by tightly pre-configured fixed questions that are asked of all participants in a specific order. Despite the “structure” of the format, participants in my study were able to respond freely and I followed up with additional questions based upon participants’ responses as necessary to clarify their understanding of those responses. This structured interview format provided a consistent approach to follow with each of the executive search firms and helped to provide authentic and fair results. The interview format allowed for all participants to have an
equal opportunity to adequately express themselves (Dimock, 2001). In addition, I planned to use an emergent approach allowing my participants to guide me through the interview. The structured interview format was used as a framework to make sure that all the topics were covered in each interview meeting.

All interviews were conducted in private settings. I decided to be extremely flexible in how to conduct my interviews and planned to allow for the participants to choose the medium (phone, Skype, video conferencing, etc.) through which they would like to have the interview conducted. I felt allowing the research participants to choose how the interview questions were facilitated empowered them and better encouraged more honest responses since they were presumably more comfortable in a research setting of their choosing. All of the participants choose to be interviewed on the phone. I did feel that the length of the interview, which took approximately one hour, was reasonable based on their busy schedules. I do believe that my interview was constructed in such a way that my participants gained as much as I did from the process (Rossman & Rallis 2003). The participants were given a summary of the transcription from my notes for post-member checking. The participants were solely involved in the revision of their own interview if any factual corrections were needed.

Each of the research participants were asked to provide material artifacts during interview session. The material artifacts are written documents such as sample contracts, internal policies and procedures, documents from searches, and any literature that is provided candidates who participate in a search with their firm. Obviously, I asked them to redact any confidential information on these documents. These written documents were part of my content analysis and triangulation. Triangulation provides researchers a means to cross-check evidence and corroborates evidence collected through the interview process.
As I was only able to interview each of my research participants once, I had to make sure that the data that I generated accurately reflected the thoughts and feelings of my participants. Therefore, I emailed a summary of my interview notes to the participants after our meetings and asked the participants to check and correct the summaries for accuracy through member checking. Member checking is a process in which the researcher checks with the participants to ensure that the interview data accurately described their perspectives. I believe that this diligence did result in interview results that were both trustworthy and authentic.

In addition, I actively listened and reflected my understanding of their responses throughout the interview. These methods helped to ensure the credibility and conformability of my study's results, while allowing for a deeper and better understanding of my participants (Dimock, 2001). The credibility of my results refers to the concept that my findings match the participant's perceptions, while the conformability refers to the fact that my data matches the focus of my inquiry rather than the researcher's preconceived notions or beliefs (Rossman & Rallis 2003).

The last form of data was keeping a reflective journal and field notes. The journal allows the researcher to describe his feelings about conducting research in this area of study. According to Morrow and Smith (2000), the use of a reflective journal adds rigor to qualitative inquiry, as the investigator is able to record his/her reactions, assumptions, expectations, and biases about the research process. The field notes provided additional data for analysis.

No major risks were anticipated for participants in this study. Allowing the participants to arrange the time and medium of the interviews reduced inconvenience. Participants had an opportunity to terminate the interviews at any time and subsequently, reschedule or drop from the study without explanation. Each participant was informed at each interview session that they
could refuse to answer any question, talk about any topic or end the interview session whenever they wish. All the participants completed the interview process.

Anonymity was maintained for the subjects by changing their names and the names of their firms to pseudonyms. The pseudonyms were used in all written records. Trade secrets of the firms were kept confidential. Any business aspects of the firm were not discussed with other firms and were kept confidential. Only the researcher had access to the actual names, addresses and phone numbers of the participants as well as confidential information. These remained in a locked cabinet in the researcher’s office. These identifiers in conjunction with transcripts, reflective journal, field notes, and coding remained in a locked cabinet in the researcher’s office. These documents and identifier information will be destroyed one year after completion of the data analysis. It was not anticipated that participants would receive monetary reward for participation in the study. They should not perceive any type of coercion to participate in the study. They will gain from contributing to the existing knowledge base and may gain some therapeutic benefit from narrating their stories.

I believe that my genuine and open approach with my research participants ensured an authentic set of results communicated in my dissertation. I believe that my interview format was fair and open-ended and allowed for my participants to openly express their perspectives. I am optimistic that my participants gained a better understanding of themselves and how person-organization fit impacts presidential searches at their firms. This ontological authenticity hopefully proved to be extremely advantageous to my participants in the future. In fact, I am optimistic that my participants were able to reflect upon their experiences and take any actions they deem necessary to improve their firm’s college and university presidential searches and selections. Additionally, I am confident that my intended audiences would able to use this
study's results to develop more comprehensive selection strategies for presidential searches by incorporating person-organization fit in their recruitment, selection, and hiring processes. This tactical authenticity empowers all involved in the study and those who read about it to make meaningful change, should they choose to do so (Dimock, 2001).

Data Analysis

This study followed a multiple firm study design where the data was analyzed firm by firm through thematic analysis and cross-firm analysis (Stake, 2006). Thus, interviews, documents, and field notes were analyzed for each firm. Following the firm-by-firm analysis, all themes and characteristic behaviors were used to conduct the cross-firm analysis. Themes and characteristic behaviors salient across all firms were maintained as well as those that were extremely different.

For the thematic analysis, the researcher followed Braun and Clarke (2006) step-by-step guidelines. These guidelines were (1) familiarizing oneself with the data, (2) generating initial codes, (3) reading throughout each transcript to immerse in the data, (4) reviewing themes, (5) defining and naming themes, and (6) producing the report. Stake (2006) describes three different cross-case procedures for a multiple case study. For this qualitative study, the researcher followed the merging findings procedure. According to Stake, the researcher whose priority is to merge the findings across cases should use this particular method. This method also allowed the researcher to make generalizations about the search firms.

Before the data was analyzed, the researcher transcribed all the interviews, documents, journal entries, and field notes. The process of transcribing allows the researcher to become acquainted with the data (Reissman, 1993). The researcher created Microsoft Word files for the
interviews, documents, and journal entries. Setting a password protected all of the files. All files were saved in the researcher's portable computer to which he alone had access.

Consistent coding procedures were developed to ensure that all the information was accurately and correctly interpreted. The researcher used categorical coding procedures as the unit of analysis for coding. This means that the data were not coded sentence by sentence or paragraph by paragraph, but coded for meaning or "open coding." Analysis begins with identification of the themes emerging from the raw data, a process sometimes referred to as "open coding" (Strauss and Corbin, 1990). During open coding, the researcher identified and tentatively named the conceptual categories into which the phenomena observed was grouped. The goal was to create descriptive, multi-dimensional categories, which form a preliminary framework for analysis. Words, phrases or events that appear to be similar were grouped into the same category. These categories were gradually modified or replaced during the subsequent stages of analysis that follow.

The next stage of analysis involved a re-examination of the categories identified to determine how they were linked, a complex process sometimes called "axial coding" (Strauss and Corbin, 1990). The discrete categories identified in open coding were compared and combined in new ways as the researcher assembled the "big picture." The purpose of coding was to not only describe but, more importantly, to acquire new understanding of a phenomenon of interest. Therefore, causal events contributing to the phenomenon; descriptive details of the phenomenon itself; and the ramifications of the phenomenon under study were all identified and explored. During axial coding the researcher was responsible for building a conceptual model and for determining whether sufficient data existed to support that interpretation.
However, I also remained flexible with my interpretations and adapted according to what my data revealed and how I believed it would best be consolidated and expressed in the final results. Therefore, I was ready to change my units of data and described them in either smaller or larger units. I do believe that the nature of my topic, along with my structured interview format, lent itself well to such (Rossman & Rallis, 2003).

I believe that my attention to detail in regards to the analysis of the data provided results that were transferable to other executive search firms (Rossman & Rallis 2003). I also believe that my results were consistent and my neutral approach allows for other researchers to replicate my findings and confirm my results (Rossman & Rallis 2003).

As the area of qualitative research increases, often social and behavioral researchers question the validity of studies that use such methodology. Thus, qualitative researchers utilize various validation strategies to make their studies credible and rigorous (Creswell & Miller, 2000). Credibility for this study was achieved using the validation strategies of triangulation, researcher flexibility, and thick rich description. The data was triangulated with the various forms of data collected in this study (i.e., interviews, documents, reflective journal entries and field notes). Thick rich description was achieved by presenting the participants' voices under each theme and by providing detailed description of each of the cases.
Chapter 4

Normative Presidential Executive Search Firm Processes

College and university presidential searches are conducted by executive search firms more than 50% of the time (ACE, 2007). The literature is steeped in “how to” books and articles outlining the process for institutions to select a new president, yet insight about the executive search firms that conduct these searches is limited. Furthermore, no empirical studies have explored P-O Fit and the executive search firm process in college and university presidential searches.

I was surprised to find through my analysis that all the executive search firms interviewed customarily followed the Association of Governing Boards (AGB) Presidential Search Guide as applicable to their role vis-à-vis the institution (AGB, 1997). The firms referred to the AGB Presidential Search Guide as the AGB process and I will call it the same throughout the rest of the dissertation. The AGB process consists of nine steps which are (1) reviewing the process of search and selection, (2) organizing the committee, (3) formulating the criteria, (4) developing a pool of candidates, (5) screening and initial checks, (6) interviewing candidates, (7) finalizing candidates, (8) appointing the president, and (9) winding down and gearing up. Step eight is not applicable to this study as the institution’s Board makes the final selection decision and appoints the president, not the executive search firm. The intended audiences of AGB nine steps are search committees, governing boards, and other constituents in institutions of higher learning. One search firm CEO said “most all us use the same process recommended by AGB with some nuances specific to our firms.”

This chapter will address clues that I found during my analysis of the normative search firm processes that lead me to ask very important questions about executive search firms and
search committees. Through the interviews and the subsequent analysis, I became very curious as to what extent the executive search firms really differ from one another and how well the executive search firms and the search committees really know each other. The details of the executive search firm processes analyzed and discussed in this chapter are not in depth as one might desire due to reticence by the executive search firms of disclosing proprietary information.

**Are We Really that Different?**

Although the participants differentiated their firms from competitors in meaningful ways in my interviews, actually, I found little differentiates the firms from each other that impact their processes or place in the higher education search market. In this section, my analysis demonstrates that while there are some characteristics such as firms’ size, origin, search consultant background and experience that are truly different from firm to firm, their processes, service differentiation, and intelligence gathering are basically the same across all the firms in the study. The details of the executive search firm processes analyzed and discussed in this section are not in depth as one might desire due to reticence by the executive search firms of disclosing proprietary information.

**Organizational Dimensions**

The search firms investigated varied by size and scope and entry into the higher education market. The search firms studied included two boutique firms, one medium size firm, and three large firms. The boutique firms’ average 2 search consultants, medium size firm averaged 10 consultants, and the larger firms averaged 25 consultants. The firms represented geography with offices in the east coast, mid-west, and west coast.

The firms became engaged in the higher education search business for different reasons. Most of the larger firms were born out of the non-higher education market with search
experience in the business, healthcare, and non-profit sectors while the smaller boutique firms were established to serve the higher education market from inception. The search firms have been conducting higher education searches on average for 15 years with the exception of two firms. These two were started in the mid-1970s when executive searches in higher education became a viable avenue for higher education institutions (HEI's) to recruit executives. Regardless of their inception, all of the search firms generally follow the AGB process.

**Search Consultant Background and Experience**

The professional staff employed by each firm entered the higher education market with varied employment experience. The professional search consultants possess work and career backgrounds ranging from business CEOs and vice-presidents to college presidents, chancellors, and deans in higher education. While exact demographics are not known based on my line of questioning, I do know the majority of search consultants have a higher education background. No patterns seem to exist in terms of career preparation; not all the firms have previous higher education executives on their staff or consultants with previous higher education experience. Some of the participants believe that an “outsider’s” view to higher education, such as a business professional, offers a healthy perspective to their process because they observe higher education without any preconceived biases. However, the search consultants’ previous background and experience does not seem to affect the firms’ approach to the search process.

All of the firms studied provide internal training to their search consultants mitigating any basic foundation of search experience gained in the business world and acclimating the consultant to the world of higher education. Overall I did not find that this experience and perspective alone appeared to produce different methods and strategies to the higher education search process.
Firms that have executive search consultants with a higher education background at a senior leadership position, feel that they are advantaged because they have experience in, and knowledge and an understanding, of how colleges work. Yet, nothing suggests that their higher education background and experience altered the AGB core process within those firms. In fact, as one CEO and previous college president stated, “I have learned far more in the higher education search business than I ever did in all of my years as a college president.” This belief is common among the previous college or university presidents. None of the CEOs and previous college presidents indicated that the expertise gained in either business or higher education made any substantial difference to their approaches to searches.

**Self-Perceived Service Differentiation**

I was curious if the participants sensed their firm had a competitive advantage over their rivals in the higher education executive search industry. The executive service firms studied are selling executive search services, rather than a tangible product with packing and labels like Tide detergent. “In packaged goods the product is the primary brand, however with services the company is the primary brand” (Berry, 2000, p.128). In analyzing each firm’s competitive advantage, all of the search firms studied used the term *brand* in response to the competitive advantage interview question and described their brand in the higher education market as differentiated from their competition. Even though each firm perceives differences in branding between their firm and the rest, I did not find any distinct differences in the services from one firm to another.

Distinguished Professor of Marketing and Director of the Center for Retailing Studies at Texas A&M University, Len Berry (2000), argues “A strong service brand is essentially a promise of future satisfaction. It is a blend of what the company says the brand is, what others
say, and how the company performs the service – all from the customer’s point of view” (, p.129). A complete analysis of service differentiation among executive search firms should include the company’s perspective, but more importantly information and analysis from the client’s perspective. My inquiry and analysis only explored the participant firms’ self-perceived service differentiation and therefore is not complete.

The study firms all offered that they brand their service with information about their credibility, longevity, professionalism, experience, quality of services performed, networking, and dual-service role to the institutional client and the candidate. Although I did not discuss these common points in more detail with participants, the firms studied appears to be more similar to each other than different in terms of their self-perceived brand and differentiation of services list.

I was surprised not to find self-perceived brand characteristics that were distinctively different in at least several of the firms, however something is missing in this analysis. Each of the executive search firms studied are appealing to some boards and search committees because all of the firms studied had been recently engaged to conduct a college or university president search, therefore the firms in my study may have an admirable “word of mouth” reputation, excellent service performance and customer service, or have competitive professionals fees that support their brand awareness in the higher education market. We do not know from the client’s or the firm’s perspective why clients choose one search firm over another or the degree that service brand plays a role in client’s selection process because I did not ask that question. Also, I did not ask each firm what their market share was in the higher education presidential search industry.
Thus, I do not have complete information to compare self-perceived service differentiation and market share for any clues that may lead me to better understand the potential impact of service brand. Despite the participant firms stating they had a competitive advantage, nothing seems to differentiate the search processes of each firm due to their perceived service differentiation.

**Intelligence Gathering**

For the search firms, intelligence gathering is a very critical and important process in presidential searches. The search committees apparently are cooperative in providing the search firms the requested information in this phase of the process. Firms gather information about the institution and the position of president through a variety of methods: print materials, campus visit and interviews, and observations. The intelligence gathered from these methods is compiled and processed to develop the Position Profile, which is then used by the search firm to recruit presidential candidates. Despite differences in size, origin, consultant background and experience, and self-perceived service differentiation, intelligence-gathering methods appear to be normative across the firms. Typically, one search consultant is assigned to the presidential search with the assistance of support staff. While I did not ask if the search consultants specialized in certain types of presidential searches, I did not find this to be the case based on the participant’s discussions. I also did not ask how many support staff were assigned to each search consultant.

**Print materials.** Prior to the site visit the search consultant and support staff tries to collect as much data possible about the institution in order to understand the strategic direction of the institution. Importantly, the firms are less interested in what has had happened in the past but
As one CEO said, "We get as much as they can give us!" The firms pay special attention to the accreditation reports. Consistently, the firms request the current strategic plan, the latest accreditation report, financials, audits, marketing materials, profiles, demographics of faculty and students, available Board information, fund giving, capital campaign materials, faculty information, and student outcomes, such as acceptance and retention rates. "Basically anything that can help us be smarter at the search," as one executive search consultant stated. One consultant said, "Board information is the best information one can have," however he did not elaborate on the details of this information. Other consultants mentioned they collected Board information, yet did not qualify its importance or detail the content. Other information requested involved the incumbent president's accomplishments and vision, recent speeches by the faculty and president, and plans for any new buildings or growth.

All of the firms and consultants pay special attention to the accreditation reports. They all highlighted that the self-study component of the accreditation report is of special interest because "institutions are usually very self-critical of themselves" and this lends insight to how the institution perceives itself and provides the search firms with additional understanding as to where the institution is heading.

The firms rely on technology. Most all of the informational requests are handled via email and attached electronic documents. The institution's website is a routine resource for all of the search firms. Several consultants mentioned that they are moving towards a paperless search process as it saves money and permits easier access and distribution of information. The collected information and documents enables the search firm to prepare itself for the campus visit to conduct interviews and observations.
Campus visit and interviews. The campus visit is a very important phase of the pre-search process as the search firm continues to collect information about the institution, develop an understanding of how the institution operates, and uncover the future direction of the institution. All the firms shared with me that they have control over and latitude within the site visit, however everyone emphasized that it is a collaborative effort with the institution. The firms focus their efforts on individual and group interviews. By gaining the perspective of the constituents interviewed on campus, the consultants can develop three or four initiatives that will help the institution achieve its objectives and help the search committee know the new president has succeeded.

Campus interviews and observations allow the search firms to gather qualitative information about their client’s institution. The search firms consider this phase of the search process to be the “discovery phase” as one CEO described, another CEO called this phase “scoping.” Another CEO said, “The site visit is a very in-depth interview process to collect information and adds depth to the pre-search study and profile.” Prior to discovery, the search firm must determine which constituents they will meet while on campus. All the participants shared that the limited two-day period on campus forces them to learn as much as possible so they can develop a well-organized plan. All reported that the institutions are very accommodating in helping the search firms meet the people they need to meet.

The list of campus constituents to interview is identical across the firms. They meet with the Board, search committee, senior leadership, middle management, staff, key faculty, key students, alumni, and local community members. The firms did interview key alumni and fund donors at the request of the search committee. The interviews are structured in a hierarchical fashion. Leadership closest to the president is typically interviewed in an individual meeting,
while those further down the institution's organizational chart participate in focus groups. Thus, the firms place much less of an emphasis on middle management and staff as sources of information due to the limited amount of time. However, many indicated that they would like to spend more time on campus to extend the "discovery" phase of the process to extend the time available to meet with these constituents. Only firm specifically stated that they were very interested in middle management and staff feedback, as it tends to provide far better information than the faculty and upper management.

The firms set strategic goals to achieve through the discovery process. Most importantly all attempt to help the institution answer the question, "how will we know that the new president has succeeded?" Curiously, during the discovery phase, the consultants, regardless of the firm, appear to be interested in more than merely the hiring of the president. They indicated that they try to help the institution determine how it will define presidential success Although worded differently, the firms all used three guiding questions when interviewing on campus: 1) strengths and weaknesses of the institution; 2) major challenges and opportunities that face the institution; 3) projections of presidential initiatives over the next five years. Many of the firms indicated that they often received consistent answers to these questions across the target campus.

During discovery, the firms try to develop a list of three or four initiatives that constituents feel are required to move the institution forward; the initiatives list aids in the development of the Position Profile. The list of initiatives is achieved through the one on one interviews and focus groups. One CEO related that the discovery phase is purposeful also in "making sure that inclusion takes place, buy-in, and excitement about the search" with the different constituents interviewed. All of the participants found that the focus group sessions are generally well attended, the constituents very engaged, and supply lots of information.
One firm shared that they liked to "cross-pollinate" between campus focus groups. This tactic involved the facilitating consultant introducing a topic brought up in one focus group, but not in the instant group, to gain a reaction and feedback. The consultants look for confirmation or contradiction on major themes and topics because the information is critical for the position description and profile. I found the participants' goal of the campus visit and interviews is to have a better understanding of the institution's expectations from the perspective of the constituents. The observations during the site visit add further understanding and meaning about the institution.

**Observations.** While spending time interviewing the campus constituents, the search consultants are also observing the campus during their visit. Information gathering occurs by walking the campus, talking informally with people, observing physical surroundings, and looking for discrepancies that may be found from the individual and group interviews. The discrepancies are considered an observation because the consultants are looking for reactions to specific questions and feedback shared from other individuals or groups interviewed.

The consultants are especially interested in gathering further information via observation "to help us better understand the institution," as one search consultant explained. Critically the consultants compare what they hear in interviews and focus groups with what they see on campus. The firms are focused on discovering patterns from comments and observations and also looking for warning signs of "off-pattern" feedback and observations that may lead to signs of a dysfunctional institution. All of the firms studied basically use this same tactic during campus observations.

Observations take place by walking around the campus informally and talking students and faculty. The search consultants want to be able to "feel" the campus and be able to describe
it to potential candidates. They like to know how “alive” the campus is, the nature of the interaction between faculty and staff, student pride, and the morale of the institution. “So much can be gained by walking around the campus,” one consultant shared. Several firms found sitting in the cafeteria with the students as an effective means to get a “feel” for the campus. Others gain insight through posters, activities advertised on campus, and simply asking the secretary for a parking pass to see how they respond. In general, they want to understand what the campus is like for an outsider.

The buildings and grounds did not play an important part in my interviews with the participants. Most often the campus physical environment did not place as high on the list as the other items discussed, that is, unless their assessment found glaring issues, such as neglected buildings or unappealing campus grounds. Several firm participants mentioned buildings and grounds as part of their assessment of the “eye appeal” of the campus to describe to potential candidates.

Observations are important to gain an understanding of the campus and institution. They provide another source of information to help build the Position Profile. One consultant said, “It is like pieces of a puzzle that we must put together to get the whole picture.” Another CEO stated, “Themes tend to develop very quickly after visiting with the sixth or seventh person on campus. If there is a different message by the eleventh or twelfth person we visit there is most likely a dysfunctional campus and misalignment.” The firms conducted their observational intelligence gathering in much the same manner. The information and knowledge obtained through interviews and observations are used to create the Position Profile.

**Position Profile.** The search firms all identified the process of defining the position, or in the firms’ professional language, the *Position Profile*, as one of critical key components in the
process. The position must be clearly defined and is developed from the pre-search work. This work identifies the skills, experience, and competencies needed for a new president to be successful. The Position Profile typically has the following institutional and presidential position components: institutional history and culture, vision and mission, strategic goals and objectives, opportunities and challenges, responsibilities and expectations, skills, experience, and competencies projected for success, and the procedure for applying for the position. All the firms studied were consistent with the components they included in the Position Profile.

The first draft of the Position Profile is shared during a meeting with the campus search committee. Each firm communicated this phase as an intensive and time-consuming process, but an extremely valuable one. They seek collaborative effort with the search committee. Many drafts result from conversations and meetings that occur before the Position Profile is finalized. Each search firm reported being very open and candid with the search committees in their findings. As one CEO said, “We disclose everything!” Another CEO said, “The pre-search work and Position Profile are what we have learned about the institution; however we do not commit to print everything we share with the search committee.” During these meetings, “search committee members talk about their fears, thoughts, and reactions to the information being presented” by the search firm. The search firm seeks to build consensus with the search committee on the agenda and competencies for a successful candidate, which will be reflected in the Position Profile.

The Position Profile sets the institution’s agenda for the next president and is the marketing tool for the search firm. One CEO expressed the high level of importance to the Position Profile as “the Bible that governs everything you do in the search including recruitment, assessment, and the actual hire. The Position Profile tells the outside world what we are doing
and keeps the internal guided and vision driven.” A search consultant stated, “Essentially we
are raising awareness of the brand and institution.” Everything the search firm does
subsequently is driven by this document. Typically, the search committee approves the Position
Profile and this assent authorizes the search firm to begin the recruitment process.

In addition, the search firm incorporates the Position Profile into a finalized work plan
and presents the plan with a time line to the search committee. Many of the firms then post the
work plan electronically on a website dedicated to the search. One CEO, said, “This helps with
the rumor mill as the publication of the full plan creates open communication and transparency,
yet protects confidentiality.”

Thus, the Position Profile is the governing and marketing document for the search
committee and search firm for the remainder of the search. The participant firms agreed on the
importance, content, or application and use of this document.

**Do We Really Know Each Other…or Not?**

It became obvious to me as I spoke with the CEO’s and executive search consultants that
a misalignment may exist between the search committees and the executive search firms.
Intriguingly a socialization process of the search committee is absent in the AGB process and the
search committee interviews. One of the most crucial steps in the presidential search process is
the organization of the search committee and appointment of the search chair, yet rarely is an
executive search firm included in this part of the process. In this section I discuss the
misalignment between the search committees and the executive search firms in the terms of
executive search firm involvement and unsuccessful searches.
Executive Search Firm Involvement

Most institutions and search committee members in particular do not have experience with presidential searches; therefore they need guidance for the search process, which typically comes from AGB. According to the AGB process the search committee and chair are appointed prior to the consideration of hiring a search firm (1997). “The majority of clients we work with have the search committee already in place prior to the engagement,” one CEO stated. My first indication of a possible misalignment between the firms and search committees was a humanic clue. Humanic clues are “clues emitted by stimuli associated with people—choice of words, tone of voice, and level of enthusiasm” (Personal Communication, Berry, 2008). All six CEO’s lamented their lack of inclusion during the creation of the search committee because the formation of the search committee is such a critical step in the process. The firms’ consultants are eager to be included because “it is very important to understand how the committees are formed and how the committee is developed,” as one CEO explained, representative of the other CEO’s. This potential understanding would provide the firms with an additional information gathering point in the process as well as insight into the institution as they would begin their pre-search preparation work. Furthermore, involvement, as one CEO explained, “By the executive search firm early on helps to create consistency to the search process start to finish.”

The executive search firms genuinely want to help in the institutional search committee development process. “We do everything possible to make the search committee successful,” stated one CEO. Another said “We are also here as a consultant to the search committee.” However, Boards often have little experience with the presidential search process, which of course includes naming a search committee. “Most Boards and committees have not hired someone before and need the guidance,” one CEO shared. The firms, if given the opportunity,
would assist the institutions along the same guidelines as the AGB process but also offer their professional experience as well. Since executive search firms are rarely brought in during the search committee development phase, institutions appear to rely on the AGB process as a guide for organizing the search committee.

I was not surprised to find that executive search firms were often not involved in search committee development because the AGB (1997) process recommends that the search committee be formed prior to engagement of the firm. One CEO shared his perspective as to why he thought search firms were not usually offered the opportunity to be involved in the search committee development phase. "[Constituents at the institution] want to own the search, get nervous, and the [search firm] might take the search a way they don't want it to go." Although only this CEO shared this candid opinion, I did find other clues from a discussion with two other CEO's that might help to explain why institutional constituents may have this perception. In discussing his firm's involvement and management of the search process, one CEO explained that "We let the committee know that we own and carry the process." Another CEO commented, "We try to influence the Board to be very careful in choosing the chair as this is a critical and very important role in the search process." It appears that executive search firms may interact with institutions in a way that possibly makes some of the institutions concerned about the firm's control of the search committee development. I believe this to be possible because words such "own" and "influence" came up in the interviews with some of the CEOs. This interaction could support the one CEO's position that constituents at the institution are concerned about the control a search firm might take the search if involved in the search committee development phase. Institutions also may misperceive the executive search firm's desire to be involved in search committee formation than it intends.
We do not know how personnel within the institutions would feel about executive search firms being involved in search committee development phase or to what extent they are aware of that search firms want to be involved in the search committee development. I did find some clues that possibly lead to understanding why firms may not be involved in search committee development. These clues add to the AGB process recommendation to bring the search firm in after the search committee is formed. On occasion, the firms studied have been brought into the process during the search committee formation, but I did not find any information as to why the early involvement occurred.

Successful and Unsuccessful Searches

Although searches are most often completed, a search can fail due to many reasons. If a search firm is not engaged at the time of the search committee development, the only resource that is currently available for institutions is the AGB process, which does not address unsuccessful searches. The search firms interviewed sometimes uncover surprises from a candidate's personal background lead to an unsuccessful search, such as alcohol or substance abuse; other times, the institution simply does not fully disclosure pertinent organizational information. However, these events appear not to happen very often in presidential searches. This section extrapolates the variables of a successful search metric, garnered from the interviews, the firms' perspectives of collaboration within the search committee, and the nature of the collaboration between the search firm and the search committee.

Successful searches. The metric of a successful search conducted by a firm should include several variables, such as, the number of searches completed, longevity of placements, P-O Fit, performance and quality of hire, and candidate's placed level of satisfaction. Executive search outcomes should be an important metric for potential client HEI's in considering a search
firm for their college or university president vacancy. On the positive side, the firms complete college and university presidential searches 95%-100% of the time according to the participants. Unfortunately, we know very little about the other metric variables of president placements because I did not ask the search firms studied to discuss the variables other than searches completed.

**Unsuccessful searches.** Despite the high completion rate of the search firms’ placement of college and university presidents, searches are sometimes unsuccessful. I found clues from the participants that begin to detect at least some of the causes of unsuccessful presidential searches were systemic to the search committees from the perceptions of the firms. Interestingly the firm personnel cited factors other than their own initiatives and behaviors as reasons for an unsuccessful search. According to the firm participants, the search committees are the leading reason for unsuccessful searches in terms of collaboration within the search committee and with the search firm.

**Collaboration within the Search Committee**

From the firms’ perspectives, searches fail more often due to conflict within the institution. As one CEO stated, “a dysfunctional committee and misalignment between the Board and the search committee equals a troubled search.” All of the participants recognized the importance of the search committee in the search process and how it may impact the outcome of a search. Search committees must have a vested interest in the search. “When search committees are not willing to think through the process, challenge themselves, and the search firm, the process is less productive and sometimes leads to an unsuccessful search,” one CEO shared.
Often search committees members are chosen to represent all the major constituents of the institution. Members may or may not know each other well, creating a need for the committee to develop trust and a working relationship within itself. The search chair must provide leadership to and for the committee. One CEO explained, “It is a challenge to pull together all the different constituents on campus to a focused process as important as a presidential search.” However, different constituents across campus have different agendas. Participants indicated that often search committees work well together, but sometimes do not. Collaboration with the search committee can be a challenging process because it is “hard to get consensus of what the search committee really wants. They see the job as a solution to a problem,” one CEO expressed.

One CEO stated, “If members of a search committee have a particular view of higher education then the outcome typically does not work out well. This is usually a faculty or trustee disagreement that has not been well resolved.” Sometimes constituents hold different understandings of what they want in a new president. From the participant’s perspective, search committees really need to understand that their next president must possess a view of higher education that needs to be multifaceted and not just academic. “It must also include public campaign, legislative, leadership, managerial responsibilities, and mission leadership skills, as they are crucial. Search committees that fail to understand this are not successful,” as another CEO discussed. I did not find any additional agenda insight to the constituents’ needs and hopes for a new president.
Collaboration between the Search Committee and the Firm

When leadership is not forthcoming to address internal issues, the firm must try to help. "Most search committees do not have any type of search experience and therefore are not aware of the issues that can arise," one CEO discussed. "There is more to go wrong than right in a search," another CEO shared. The firms appear to want to be challenged by the search committee by asking questions about the process. Though the firm will be accountable for the facilitation of the process, the search committee needs to challenge the search firms by asking questions, demonstrating curiosity about the process and candidates, and learning and thinking through the search process as just a few examples. The firms studied appear to want the search committees to challenge the status quo and show genuine interest and involvement in the process. As one CEO shared, "instead of just paying us they [search committees] should be pushing the search firm and themselves."

If the firm has to push the search committee too much, the search may be compromised. When search committees are not challenging the process by asking questions, learning, and thinking about the process for the institution and are therefore not involved, the search firms must "force" involvement and inclusion creating an uncomfortable environment for both parties. In other words, if a search committee pays the search firm to find a new president and the search firm does all the "institutional thinking" of the search process without any input from the search committee, then the process is not balanced and the search firm is controlling the process. This potential for the firm to take over a search needs to be researched more.

A firm that must push a search committee occasionally may be an additional clue as to why the firms in the study perceive that an institution may feel it will take the search in a different direction if involved in the search committee development. "It should be a mutual and
healthy process whereas both parties are challenging each other to get the most out of the search. When search committees are less involved the probability of an unsuccessful search is greater,” stated one CEO. It appears a healthy search process can best be characterized as collaborative effort in which the search committee and the search firm work through the “institutional thinking” of the presidential process as a team to fill the presidential position. Not only is it important for the search committee to be able to work with the search firm in a collaborative relationship, it is also important for the search committee to collaboratively work together as a group representing the institution.

Based on their experience, the search firms made the case of unsuccessful searches being interconnected to dysfunctional search committees. The participants clearly want to be offered a “seat at the table” with the institution when the search committee is developed. Additionally, the search firms feel they can assist with the development of the search committee, but rarely are afforded the opportunity, contrary to the AGB process. Although the participants did not admit that their firms might be complicit in an unsuccessful search, the search firms most likely do understand and might provide valuable guidance during the search committee development and the issues that may arise.
Chapter 5

Cognitive Presidential Executive Search Firm Process Analysis

Appropriate college and university president selection decisions are vital to an institution’s success. The presidential search process is complex and consists of many variables as discussed in chapter 4. As one CEO stated, “there is more that can go wrong than right in a presidential search.” Often search committees are focused on hiring a president based strictly on the candidate’s experience and competencies, that is, the Person-Job Fit (P-J Fit) because these criteria are tangible, easily accessed and assessed through reference checking and past accomplishments, and obviously important in the selection process. Although P-J Fit is an essential assessment in qualifying a presidential candidate by the search firm and search committee, my study suggests that P-Organization Fit is a differentiator in the selection process. Search committees and executive search firms should be able to qualify new college and university presidents on more than P-J Fit because hiring a president who is not a good cultural fit with the institution can lead to turmoil, a short tenure, and can be very costly. This chapter explores in the selection process of college and university presidents.

Are You Getting Value from your Selection Process?

“People are hired for skill but fired for fit,” one CEO said. Fit, of course, refers to the degree of harmony between the president and the institution’s culture. All of the study participants stated P-O Fit to be a critical part of the interview and selection process. I found all the executive search firms in the study consider P-O Fit in the selection process and use the concept and characteristics to some extent. P-O Fit as a concept is basically understood by all of the study participants, yet they found it difficult to define. Each of the CEO’s and executive search consultants interviewed reinforced the importance of P-O Fit to the process and outcomes;
however everyone expressed the difficulty of assessing P-O Fit in the process. The Position Profile, as discussed in chapter 4, evolves as a fundamental clue in the analysis of P-J and P-O Fit in this chapter. The Position Profile, candidate assessment, and final candidate selection discussions will expand on this analysis from the perspective of the search firms.

**Does the Shoe Fit?**

Search firms must be able to assess and determine not only P-J Fit, but also P-O Fit in order to add value to their search services for client institutions. I found P-J Fit assessment to be a strong competency of the search firms interviewed however although P-O Fit assessment appears to be extremely important, it is an insubstantial competency of the search firms.

I was not surprised based on my literature review and personal human resource executive experience to find all of the search firm participants are very skilled and competent in the assessment of P-J Fit. Tomoki Sekiguchi (2004) explains that P-J Fit is the traditional foundation for employee selection.

The primary concern with employee selection has been with finding those applicants who have the skills and abilities necessary to do the job. Traditionally, P-J Fit is assessed by determining the demand of the job through job analysis, which identifies the essential job tasks an incumbent performs, and requisite skills, knowledge, and abilities to perform the job tasks. (p.183)

The methods involved in collecting information for a job analysis usually include interviews, observation, and logs or diaries. The sources of data usually include employees, supervisors, and managers and are typically conducted by a job analyst or an outside consultant. The gathering and analyzing information about the content requirements of the job is systematic. The work products produced from a job analysis are a job description and job specifications. A
job description is the identification of the tasks, duties, and responsibilities of a job, while job specifications are the knowledge, skills, and abilities an individual needs to perform a job satisfactorily (Mathis, 2011). I also discovered the process of developing the Position Profile by the search firms, as discussed in Chapter 4, entails the same process and due diligence as a formal job analysis.

The firms use the Position Profile to assess presidential candidates for P-J Fit. All of the participants shared the importance of vetting, to the best of their ability, the presidential candidate's knowledge, skills, and abilities are consistent with the Position Profile. Vetting is the professional language used by the search firm when they assess a candidate to the institution's Position Profile and based on the candidate's P-J Fit with the position either qualify or disqualify the candidate for continued consideration.

I found all of the firms interviewed for the study have methods in place to assess P-J Fit and did not find any firm had difficulty or concerns with their ability to assess for P-J Fit. As one CEO shared, "A tremendous amount of time, effort, and research is dedicated to the Position Profile because this crucial document is used for marketing, assessment, and controls everything we do with the search for the institution." The applicant screening and assessment process is a funnel of phases as the search firm begins the filtering process of initial applicants to the final group of candidates (see Figure 4). As one CEO said, "the next step in the process is learning more and more about fewer people." The details of the executive search firm processes analyzed and discussed in this section are not in depth as one might desire due to reticence by the executive search firms of disclosing proprietary information.
Using the Position Profile as an assessment tool to qualify applicants as candidates and candidates as finalists, the firms sequentially sort presidential applicants into three distinct pools through a continuous screening process: applicants, qualified candidates, and finalists. The Presidential Applicant Filtering Funnel is a method of sequential and continuous evaluation and sorting in phases of the applicants who have applied for the position. The search firms distinguish between applicants and candidates. Applicants are job seekers who have applied for the position of president. Candidates on the other hand are applicants who have been evaluated and initially are deemed qualified for the position. Initially, all the professionals who have
applied for the position of president are in the applicant pool. Some applicants advance to the qualified candidate pool, but only a select few candidates advance to the finalist pool.

The participants used generally accepted human resource professional language for applicants, candidates, and finalists, however they did not use the terms pool or funnel in their description of the process. I felt based on the interviews with participants it was best to group the applicants, candidates, and finalists in pools and the process as phases in a funnel. This appears to me to be a more concise and deliberate characterization of the common process that participants described.

Applicant Pool Phase. The professional language for recruitment by the search firms interviewed is called sourcing, which is the process of creating the initial applicant pool. In sourcing the search firm markets, advertises, and communicates the position to the higher education community to attract as many applicants as possible. In this initial stage of the process the search firms assess all applicants. The search firms do the “heavy lifting” of the process, however the process is transparent to the search committee through regular communication and updates. Curriculum Vitae evaluation and phone screens are two distinct steps that occur in the Applicant Pool Phase.

The search firms initially screen and assess 30 to 40 applicants on the average to fill the vacant presidential position for the client institution. The average pool does not appear to differ whether the client is a public or private institution. This pool consists of those who applied for the position. Once applicants submit their basic credentials, P-J Fit is the primary focus of the executive search consultant. In this stage, all the search firms assess applicants’ CV against the requirements of the Position Profile to determine if they appear to have the necessary skills,
knowledge, and abilities on paper to be considered for a phone screen with an executive search consultant.

All the participants revealed the phone screens were also focused on P-J Fit with the Position Profile serving as the measuring tool. Three participants explained that during a phone screen, "we are very interested in understanding past accomplishments as they align with the position requirements." One search consultant told me, "If fund raising is important to the institution, and it generally is, we need to find candidates who have a successful track record of fund raising accomplishments." Another search consultant told me, "If the institution is unionized then we must find a candidate who not only has worked in a unionized environment, but one who has successfully accomplished the objectives of the institution in a unionized environment." The search consultants are evaluating the accomplishments listed on the CV and drilling deeper to determine the role the individual played in the accomplishment, that is, how they actually "did it." The firm's look for any derailers the person might have experienced during project development and implementation and how the individual dealt with those derailers. Responses to these inquiries help the search consultant and thus the search committees to better understand the individuals' competencies.

Past accomplishments emerged as the most often discussed assessment criterion for search consultants vetting presidential candidates on P-J Fit. Candidates who successfully are vetted using their CV and the phone screen move to the qualified candidate pool. All the participants used basically the same methods to assess P-J Fit to the Position Profile in screening the applicant pool and moving the process to the next phase.

**Qualified Applicant Pool Phase.** The responsibility for assessment of candidates begins with the search firm in the applicant pool, but begins to shift in the qualified candidate pool
phase. During this second phase, the search firm still handles the majority of the work; however, the institution's search committee also assesses potential candidates and decides which candidates will be interviewed. Presenting the top list of candidates to the search committee and facilitating the interview process with the search committee are two important steps that occur in the Qualified Applicant Pool Phase.

The purpose of screening the initial 30-40 applicants by the search firm is to develop a pool of 10 to 12 viable candidates, who are "serious contenders" as one firm CEO stated, that will be presented to the search committee for consideration. The 10 to 12 presidential candidates being presented to the search committee are referred to what participants call the firm's "top list." Similar to others, one CEO shared, "we find that we are rarely over turned when presenting our top lists." The search committee does not see all 30-40 applicants, but instead just the ones deemed qualified by the search firm. Occasionally a search committee rejects a candidate on the "top list" because it does not find the person qualified, based on the CV and interview summary documentation.

All of the search firms provide a CV, interview summary, and candidate letter of intent of the top list candidates to the search committee. Once again, I found at this step the emphasis is still on P-J Fit as the interview summaries are attentive to the alignment of the candidate with the Position Profile. Although the top lists are rarely over-turned, I discovered the lists as a whole are not generally initially accepted by consensus of the search committee. Most often the search committee initially agrees on two-thirds of the candidates who remain viable. The firms then assist the search committee to evaluate and reduce the list. "We have the search committee members write down their top eight candidates. We find in most cases the committee will have
five people they all agree with. They then only need to discuss a small group of candidates to fill the remaining three slots,” one CEO explained.

Eight to 10 candidates appear to be the optimum number of candidates that the firms would like the search committee to interview. The firms refer to this step as “narrowing the pool with the search committee.” Within this step P-J Fit appears to be the only criterion being considered.

Once the search committee has narrowed the pool of candidates, the selected candidates are invited via the search firm to meet with the search committee for an interview. The interviews with the search committees typically take place at hotels and are often referred to as “airport interviews” because candidates fly to a major city closest to the institution and meet the search committee in a hotel close to the airport. The search firm is responsible for all of the arrangements, logistics, and organization of the airport interviews. I do not know the involvement of the firm and consultant during the interviews, such as preparation of interview questions, since that question was not asked and the participants’ did not expand beyond a very general overview. One small search firm deviates from the airport interview norm to the temporal and economic advantages for both the institution and the candidates. This firm’s CEO said, “Airport interviews are an old way of doing things. We find a central spot, usually a hotel where the search committee can be in one place. Video conferencing is something we have been using for some time, as the candidates do not travel or travel very little and it is a very economical approach.”

Though all the search firms bring search committees together in one central location to assess candidates, I only found one cognitive clue that would lead me to believe the search begins to move away from solely P-J Fit at this step of the process. One search consultant stated,
This is a very interesting stage in the process because it becomes real for the search committee, the human nature and psychology aspects come out during the interviews because the search committee is seeing them [candidates] in person for the first time versus on paper.” This is true for the firm and search consultant as well.

**Finalist Applicant Pool Phase.** Upon interviewing the top list of candidates, the search committee selects three to four finalists. The Finalist Applicant Pool Phase consists of two steps: selecting the finalists and reference checking by the search firm.

The selection of the three or four finalists appears to still focus on P-J Fit. Notably all of the participants shared the importance of reference checking and indicated that once the 3-4 finalists were selected by the search committee in-depth interviews commenced. All the firms tend to check an average of 8-10 references for each finalist and these telephone interviews last from 45 minutes to one hour. Although the participants did not divulge the actual referencing checking questions, they did share that they were validating past accomplishments and involvement, another data point to cross reference with the phone screen and CV information, trying to get a “pulse” on what the candidate is like to work with as a person from colleagues, understanding the person’s leadership style, and uncovering anything else that is germane to the position and client institution. The reference checking by the search firms’ supports one participant CEO’s statement, “We are learning more and more about fewer people.” Furthermore, I discovered a humanistic clue towards the end of the Finalist Pool Phase that leads me to believe that referencing checking is not solely focused on P-J Fit.

Curiously at least half of the participants indicated that the selected finalists did not make a campus visit. “The process did not include any on campus or public visits,” as one participant, noted when they discussed a recent presidential search. Although the finalists may not make a
campus visit, the Board interviewed them according to all the participants. I did not uncover why some finalists made a campus visit while others did not. Additionally, I do not have any insight to the Board's interview process with the finalist but as one CEO stated, "At this phase of the process we [search firm] are now in the role of advisor and counseling the client through the final decision process."

Figure 5. Cognitive Turning Point

The Cognitive Turning Point in the presidential search process, through the lens of a search firm, occurs in the finalist phase (see Figure 5). At this point the participants shift dramatically from a discussion about the normative process to one of a cultural nature. I learned at this point of the process the search committee finally can talk with the qualified candidates in the narrowing down phase at the "airport interviews," see them face-to-face, and get a sense of their personality and leadership style. In the case of one study search firm, the search committee reached the same point via video conferencing, which still allowed the search committee the beginning of cultural insight. Therefore, the Cognitive Turning Point, as I have pronounced this point, is where I discovered the beginning of P-O Fit evaluation. Until this last part of the third phase, the search firms and search committees focus on P-J Fit to ensure that the finalists are aligned with the Position Profile, that is, are exceptional P-J Fit finalists. P-O Fit does play an essential role in tapering the process in the selection of a college or university president.
However, dialogue by the participants discussed P-O Fit very little until we discussed the end of the process. A CEO signified this discovery by stating, “P-O Fit should always come at the end of the process and not be one of the first deciding factors.”

**What's in a Name? Person Organization Fit (P-O Fit)**

"A rose by any other name would smell as sweet" is a commonly quoted part of a dialogue in William Shakespeare's play, *Romeo and Juliet*. The heroine contends that the names of things do not matter, only the object itself. I found the same to hold true with the participants in the study in terms of defining Person-Organization Fit. P-O Fit is broadly defined as the compatibility between people and organizations (Kristof, 1996). In the employee selection literature, P-O Fit is conceptualized as the match between an individual and organizational attributes (Judge & Ferris, 1992; Rynes & Gerhart, 1990).

All the participants expressed P-O Fit as “cultural fit” and to that point “cultural fit” is the professional language used among the participants. I purposely did not define P-O Fit with the participants to determine their understanding of the concept. The participants shared somewhat of a common orientation in their comprehension of P-O Fit. Several search consultants and CEO’s described P-O Fit as soft skills, skills that are subjective in nature and described P-J Fit as hard skills (competencies), which is distinctly different and objective in nature. As one CEO remarked, “There is fit and not fit, it is very hard to make sense out of it because it is so subjective.” Another CEO stated, “It [Cultural fit] is an art, it’s the level of comfort between the candidate and the institution. It is not industrial psychology.”

Across the board, the participants, and therefore by extension the search firms, understand that P-O Fit refers to the compatibility between the finalists and the institution. Supporting that impression, I had a thought-provoking interview and perspective with one CEO
who expanded on cultural fit and referred to it as the “language of romance. Fit easily slips into
the language of romance. The language of romance is the most unconscious part of client choice.
Fit falls into that language. People are swept up by their emotional response. Fifty percent of the
divorce rate is based on the language of romance.” This CEO’s perspective encompasses the
understanding of P-O Fit across the participants and firms studied.

Thus, P-O Fit does not emerge until the end of the process, the Finalist Pool Phase,
because P-J Fit must be vetted and align with the position before P-O Fit is evaluated. Otherwise,
a search committee could be swept up in their emotions of hiring someone whom they thought
would be a great cultural fit, but yet did not have the necessary or best competencies to help the
institution achieve the objectives set forth by the Board. The search firms realize cultural fit is
subjective and in their own words therefore is difficult to evaluate.

P-O Fit Assessment

Albert Einstein said, “Everything that can be counted does not necessarily count;
everything that counts cannot necessarily be counted” (Cameron, 1963, p.13). Participants not
only had difficulty defining P-O Fit, but indicated complications with assessment. One CEO
stated, “Cultural Fit assessment is the most difficult, but yet the most important.” Despite the
importance of cultural fit, the firms appear not to have developed an accepted, industry-wide
formal system to assess this amorphous criterion concept. “There is no magic tool to determine
fit,” as one CEO expressed. However, within their generalized assessment methods for P-O Fit, I
did find several commonalities across all firms in the study. The details of P-O fit analyzed and
discussed in this section are not in depth as one might desire due to reticence by the executive
search firms of disclosing proprietary information.
The study consisted of six higher education executive search firms: two boutiques firms, one medium size firm, and three large firms. The firms identified six different loosely defined assessment methods for P-O Fit (see Figure 6). Reference checking and search committee reaction were the most often mentioned methods of P-O Fit assessment. The participants shared little insight into the other five methods; therefore

Figure 6. Firm Assessment Methods by Size of Firm

<table>
<thead>
<tr>
<th>Method</th>
<th>Boutique</th>
<th>Medium Firm</th>
<th>Large Firm</th>
</tr>
</thead>
<tbody>
<tr>
<td>Behavior Modeling Interviews</td>
<td>x</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Interviews</td>
<td></td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Candidate Self-Awareness</td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>“Gut Feel”</td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Personal Institutional Knowledge</td>
<td></td>
<td></td>
<td>x</td>
</tr>
</tbody>
</table>

I am only able to list them. Only one participant from a boutique firm mentioned behavioral modeling interviews, but was unable to disclose any further proprietary information. Often human resource professionals use behavioral modeling interviews. Behavioral based interviewing is interviewing based on discovering how the interviewee acted in specific employment-related situations. The logic is how a candidate behaved in the past may predict how they will behave in the future.
Reference checking and search committee reaction appear to be the methods that all of
the firms use regularly. While reference checking is critical to validate P-J Fit, "lots of
references are key in assessing cultural fit," as one CEO commented. Although all but one of the
firms did not disclose the type of questions they would ask during reference checking, all
expressed the important role that reference checking played in P-O Fit assessment. The executive
search firm is better equipped than the search committee based on their experience and expertise
to ask the right questions to get at cultural fit. One CEO shared a strategy he had learned a long
time ago:

An old technique I learned from a sales trainer was [a] questions and answer session.
Make anyone answer what you want by not making them have to think about answering
the questions. Instead give them questions in advance so they have time to think about the
questions and provide you with better information and dialogue, you must then only
control the conversation.

This strategy is the most specific example provided to me; yet it does not explain the content
components of P-O Fit assessment, but rather the method component.

Search committee reaction, as a method of cultural fit assessment, was an interesting
discovery "as committee members always have early reactions," as one search consultant stated.
All of the participants relied on search committee reaction to the finalists as a gauge to cultural
fit. Another indicated that "The search process is continued refinement; it is personal and
emotional, and it's based on reactions." An interview with one search consultant resulted in an
interesting perception about search committee reaction. One way of thinking about search
committee reactions would be to use an
analogy to real estate and buying a home. You describe to the agent what you want. A good agent will show you a small number of homes and you let the agent know what you think, the agent will watch your reaction and based on the reactions the next phase a good agent will line up with all the good homes to your wants. As search consultants it is the reaction in addition to the description that has been provided.

Another consultant stated “You can tell from conversations with the committee what is not fit and style for the institution.” Obviously by this time the search consultant and the search committee know each better and therefore the search consultant may have a better understanding of facial reactions and tone of voice in conversation. The participant did not expand further nor did I ask about any further meaning to this detection. It was apparent from the participants interviewed at this junction that the role of the search consultant changes more to one of a facilitator and resource to help guide the search committee to the finish line.

I was having difficulty understanding why all the participants were offering me the perception that P-O Fit was so critical, but on the other hand my interview discussions were not unveiling much that was substantial in the terms of P-O Fit assessment work products developed by the search firm. My analysis did not indicate at any time that the client institution expected the search firm to conduct or provide a cultural fit assessment. Despite not having an expectation to provide a P-O Fit work product, the search firms studied conduct an informal process of cultural fit assessment.

It was not until I asked the question “How much weight is given to fit in making a recommendation for finalist to the institution” that I discovered a sign that possibly explains the lack of substantial interview feedback. What I found was that I had unearthed another critical and pivotal turning point: Who is responsible for P-O Fit assessment? The information unfolded
to explain that executive search firms engaged to conduct presidential searches for institutions of higher learning understand P-O Fit, know it is critical to the process, and have different methods of assessment, but yet are not ultimately responsible for cultural fit assessment.

**Closing the Presidential Search**

A typical college or university presidential search will take four to six months to complete according to the participants. Both the search firm and the search committee have invested a lot of time and energy in the lengthy search process. My analysis revealed some interesting findings during the end of the presidential search process. It is important to note that my findings are only from an external perspective of the institution from the six search firms interviewed. Therefore, I do not have data to analyze from the institution’s perspectives of the search committee and the Board.

If executive search firms recognize the importance of assessing P-O Fit and have various informal methods to assess P-O Fit, why does it appear that the client institutions may not be attentive to this important cultural element of selecting their next president? I found several important factors that possibly contribute to this phenomenon: the relationship between the search committee and the executive search firm, the level of understanding and importance of P-O Fit by the search committee, and the locus of the final decision.

**Does the Relationship Change?**

In the finalist stage, the relationship between the search firm and the search committee is divergent; it is much different than in the early phases of the process. In phase one (Applicant Pool) and phase two (Candidate Pool) of the search, the search firms are intensely involved. However, during phase three (Finalist Pool) of the search process, the search firms face a different role.
As the search enters the final stage, it appears based on the participants' comments the search committee relationship with the search firm is one that has become less dependent as the search progresses. During the first two phases the search committee expects to receive a Position Profile and candidates; however in the final phase the search committee does not receive any significant tangible work products from the search firm. The search firm's role shifts from delivering tangible work products to one that is advisory and consulting to facilitate the final decision. The relationship clearly transitions into a limited role as a facilitator and a resource but without any authority as they experienced in the earlier phases of the search. One consultant best expresses the change in relationship, "at this point in the search we move into the role of facilitating self-discovery with the search committee." The participants all conveyed a similar message when discussing the final phase of the search process: "We want to guide the search committee to ask the right questions and help create awareness for the committee to look for [cultural fit]."

In the final stages, I found the search firms were not responsible for providing a Cultural Profile or any other P-O Fit type work product, similar to a Position Profile, but rather focused on the cultural aspects of the institution and P-O Fit. The search firms studied feel they have an educative role, but are not utilized to deal with P-O Fit even though the firms have gathered the qualitative information. Although the search firms are gathering P-O Fit intelligence on the finalists, it is unclear what happens to the information when the search committee is deliberating on a final short list of presidential candidates to submit to the Board. None of the participants try to bias the search committee if they felt a finalist was not a cultural fit in their assessment, but rather "try to help create awareness with the committee, focusing on [the finalists'] strengths and facilitating discussion about fit." I was unable to determine how successful the consultants were
in creating P-O Fit awareness with the search committee or the search committee’s reaction to the discussions about fit.

**Is P-O Fit Understood or Important?**

The search firms use the professional language of “cultural fit.” Cultural fit was described by several of the CEO and consultants interviewed as “good or bad match with the institution...personality match with the institution...attitudinally a good personality match.” The search firms try to broaden the candidate assessment from P-J Fit to be inclusive of P-O Fit; however the firms believe that the search committees continue to focus on P-J Fit and appear to be indifferent to P-O Fit. The understanding and importance of P-O Fit is a dichotomy when the search firm and search committee are examined.

The search firms are not only aware of P-O Fit, but understand the impact of a “poor fit” of a new president. One consultant stated, “You must understand culture and cultural fit. The wrong person will not fit.” A CEO emphasized, “Cultural fit in my experience is very important.” All the respondents were asked if fit impacts the outcome of presidential searches and all responded affirmatively with comments ranging from “absolutely” to “without a question.” All of the participants identified that a bad fit “most often results in a short tenure for the new president.”

Although the search firms understand the importance of P-O Fit, they convey a different message about the search committees. Search committees generally having a weak understanding of cultural fit and its impact according to the participants. “Search committees and Boards do not understand cultural fit or its impact,” as one CEO shared. One consultant stated, “It is very important for the search committee and Board to understand cultural fit, but most don’t.” Another consultant found that the search committees are mostly focused on other
variables: "Committees tend to be interested in research, teaching, shared governance, fund raising, and beyond that committees tend not to have much more interest."

All of the participants in the study understand the concept of P-O Fit as well as its importance in the search process. However, they believe that search committees and Boards may or may not understand the concept nor have the means to assess it. It is very difficult to understand and prioritize something that is difficult to measure. The possible fact that the search committees are mostly focused on variables other than P-O Fit compounds the relationship change between the search firm and the search committee in the finalist stage. Indeed, when the final decision is made, P-O Fit may or may not materialize as a meaningful factor in the discernments of the search committee and Board.

Who Makes the Final Decision?

Obviously, the Board has the ultimate authority to select the new president; however the search committee and the Board should consider P-O Fit. Whether it is mindful or not of this essential component, "The Board really makes the cultural fit decision." The emergence of this discovery from my analysis leads me to question to what degree the Board understands the concept and impact of cultural fit. The search firms attempt to create awareness with the search committees about cultural fit. "Cultural fit is an issue. We have to advise the committee and reinforce the importance of cultural fit," as one CEO shared. The participants feel responsible to not only create awareness about P-O Fit, but to also share any P-O Fit concerns they had about finalists with the search committee. One CEO said, "We help the client evaluate the pros and cons of the candidates and provide our professional opinion." Another CEO explained that his firm, "When we feel there is a misfit we let the client know our opinion."
However, given the focus of this research, we do not know to what extent search committees and Boards give careful consideration to P-O Fit feedback provided from the search firms. The search firms interviewed did not share any further insight to exactly how P-O Fit is evaluated and what is discussed at the search committee level and ultimately at the Board level when the final decision is rendered internal to the institution. Not only do we not know to what extent the P-O Fit feedback from the firms is utilized, I was unable to determine the extent the Board understands P-O Fit and its impact, however as one CEO stated, "it is ultimately up to the Board to make this assessment [cultural fit]."
Chapter 6

Conclusion

I have learned a lot about qualitative and case study research. I found qualitative research to be very time consuming, but very productive work. My journey and experience conducting this study has taught me several key lessons: read and reread interview transcripts numerous times, always analyze your data from a "50,000 foot" view, and do not look merely for patterns that are expected or desired. Finally, qualitative research is an effective method to examine aspects of organization cultural phenomenon.

In retrospect, I might have probed deeper in certain areas of inquiry or asked different questions, which might have produced more information. However, as a result of my data analysis, I uncovered three essential findings: shifting role boundaries, traditional role expectations, and limitations due to tradition. These conclusions contribute to our understanding of the presidential search process from the search firm perspective and should assist search committees and others involved in searches in a meaningful way.

Shifting Role Boundaries

The journey of an executive search firm in the presidential search process consists of different roles and relationships with the search committee throughout the lengthy process. The search firms experience times when they are "closer" to the search process and other times they are more distant to the process, analogous to the firms being an "insider" or "outsider" to the process as depicted in a Model of Firm Insider-Outsider Roles (see Figure 7). The red sections of the figure represent the firms as "outsiders" to the process, while the green sections represent the firms as "insiders" to the search process.
The presidential search process begins with the search firm as "outsiders." The Search Committee Development phase most often is completed without the assistance of an executive search firm. Therefore, the search firm and the search committee typically do not begin a professional relationship until after the search committee is appointed. Furthermore, AGB (1997), in their 15-year-old guide to institutions, recommends the search committee should be developed first and then a decision as to whether to engage an executive search firm should be considered.

Once a decision has been made to engage an executive search firm in the presidential search process, the relationship between the search firm and the search committee is initiated. The search firm becomes an "insider" during this phase of the process as the search firm actively works together with the search committee towards a common goal in the development of the Position Profile.

The relationship between the search firm and the search committee is best clarified as harmonious as both parties work closely together during this phase. The search firm is seeking as much information as possible about the position and the institution. Search committees reportedly are very cooperative in this effort as they accommodate most any request for information from the search firm including planning for the campus visit. However, in the few
instances when a presidential search fails, the firms attribute the problem to a dysfunctional search committee and consequently the relationship between the search committee and the search firm typically is at risk.

In the Applicant and Qualified Applicant phase, the search firm is securing and screening candidates for the position to present a top list to the search committee for consideration. The search firm utilizes the Position Profile as the governing guide during this phase. The search firm continues as an “insider” assisting the process in this phase. The search firm is making decisions on potential candidates as to whether or not they are moved from an applicant to a qualified applicant status. Interaction and reciprocal communication occurs between both parties – the consultant and the search committee – in this phase. The search committee reacts and provides feedback about the top list of candidates presented by the search firm consultant. The relationship continues to be healthy as both parties work closely together in this phase, however the role and relationship of the search firm with the search committee begins to wane from vigorous work and interaction towards the end of this phase.

As the Applicant and Qualified Applicant phase closes, the search firm’s role changes yet again. The search firm becomes an “outsider” upon entering the finalist phase. The search firm steps back from engaged involvement and project work with the search committee, moving into an advisory and educational role in the finalist phase. The relationship between the search firm and search committee in this phase of the process is best described as reserved.

The search committee provides input into the final decision to select the president, but ultimately the Board chooses the new president for the institution. The search firm makes no decisions in the finalist stage and therefore acts only in a consultative role. The search firm is
focused on facilitating the awareness of the strengths and weaknesses of the finalists with the search committee, which includes attentiveness to any cultural fit concerns.

**Traditional Role Expectations**

A search for a new college or university president is time consuming and consists of many different components and phases. Not only do search firms experience shifting role boundaries, but they also experience different role expectations throughout the various phases. Traditionally the search firm has clear and implicit role expectations when conducting business as an “insider” to the search process (see Figure 7). Conversely, the search committee has clear expectations of what will be received from the search firm during the Position Profile, Applicant, and Qualified Applicant phases. Why do search firms have clear role expectations as an “insider” to the process?

The Position Profile, Applicant, and Qualified Applicant phases are the normative patterns that occur in a presidential search, are objective in nature, and are focused on P-J Fit. Search firms have years of experience perfecting the normative phases of the search process. The search firm expects to produce certain deliverables to the client search committee and the search committee expects to receive the deliverables as part of the agreement with the search firm. Specifically the search firm expects to deliver the following quantifiable major work products and services to the client: campus visit, Position Profile, resumes, reference and background checks, initial phone screens, top list of potential candidates, coordination of interviews, and consultation to assist in the closure of the search.

The Position Profile is the most vital work product the search firm produces, as it is the guiding document for recruitment and screening of candidates for the position and is a strength and competency of the search firms. The Position Profile is an objective document that is easily
quantified and verified through criterion-based measures such as job skills, past performance, past accomplishments, and other objective competencies desired by the institution in the referencing check process. The strength and refinement of the Position Profile process by the firms studied is no doubt a result from years of presidential search experience. This experience holds true for the other work products and services previously listed and expected by the search firm.

Subsequently the search firms have a deliberate and well-executed strategy to collect P-J Fit information, but is the search firm more interested in a successful search or a successful president? Search firms take a special interest in collecting more than just tactical position and institution information during campus site visits. Undoubtedly firms are interested in more than just placing a new president at the institution. The firms are also interested in strategic information indicating intent to extend beyond just placing a new president or completing a successful search. Even though the firms have a lot of information and numerous areas to address during a standard two-day campus visit, special emphasis and time is dedicated to understanding the strategic needs of the institution that the new president will face. While on campus, the search firm targets questions with the staff, faculty, administration, search committee, and Board that explores the strategic challenges facing the institution and accomplishments that should occur at the institution over the next five years. This information is used to bolster the Position Profile and ensure that the P-J Fit is in alignment with the strategic needs of the institution. “The first phases of the process are where the position is defined and the work agenda for the new president is set,” as one CEO summarized.

The normative phases of the search process are particularly well organized, fully developed, planned, implemented, and expected by both parties in order to place a successful
president. Indeed, both the search firm and the search committee are focused on objective variables or P-J Fit during the Position Profile, Applicant, and Qualified Applicant phases of the process. Neither party is focused on other extraneous variables or issues that could distract them from the goal or create distance between the parties and hamper the relationship.

**Limitations Due to Tradition**

Consideration of P-J Fit and traditional search firm roles, expectations, and processes, steeped in objective criterion, necessitates more than simple compatibility between a position, such as college or university president, and an individual’s knowledge, skills, and abilities. P-O Fit can be broadly defined as the compatibility between individuals and institutions. The basic premise is the degree to which personal attributes of an individual are congruent with the characteristics of a target organization and contributes to important positive individual and organizational outcomes (Rynes & Gerhart, 1990). P-O Fit is essential in the selection of a new college or university president because a bad fit can lead to rapid turnover, additional cost, and turmoil in the institution. However, the subjective components and process of determining P-O Fit are not as refined nor as complete as those for P-J Fit. Limitations due to tradition include assessment, outcomes, and communication of P-O Fit.

**Assessment.** A construct as hard to define as P-O Fit is difficult to assess due to its subjective nature. Firms refer to P-O Fit as *cultural fit* in their professional language and express their understanding of P-O Fit or cultural fit in different ways, but “know it when they see it.” However, firms struggle to develop or express one standardized and consistent definition of P-O Fit as they do with P-J Fit. Methods to assess P-O Fit are limited within the search firms’ understanding; however the firms have found several approaches for assessing P-O Fit. At this time, though, “assessing P-O Fit is an art,” as one CEO, articulated.
Obviously defining and measuring an objective construct like P-J Fit, a long-standing competency of the firms, is easier. Traditional search firm roles, expectations, and processes have centered on P-J Fit. Less emphasis on P-O Fit has been limited and the firms are not proficient in its assessment.

**Outcomes.** Without the ability to assess P-O Fit with the same vigor as P-J Fit, outcomes linked to P-O Fit are difficult. The standardized definition of P-J Fit and ensuing assessment authenticates job knowledge, skills, and abilities; however P-O Fit is more challenging in substantiating positive outcomes. The literature is saturated in positive outcomes from P-O Fit, however the negative results, such as turnover, most often occupy scholars’ interests. Turnover and the associated costs for a college or university president alone make a solid case for the inclusion of P-O Fit in the presidential search process. Reduced risk of turnover may be the only single outcome that search firms can discuss with relevance to the search committees.

Outcomes such as turnover are more definitive. Yet, P-O Fit does not characteristically have a clear line of sight to outcomes. More elusive outcomes, such as increased job satisfaction, commitment, and performance, resulting from P-O Fit are important variables to an institution of higher learning. Unfortunately these variables are much more difficult to assess and relate to outcomes. Traditional search firm roles, expectations, and processes have focused on the relevance of objective outcomes in discussions and work products with the search committee. The subjective nature of P-O Fit could impact its relevance with the search committee. The possible impact on the relevance of outcomes versus P-J Fit could make it difficult for search committees to understand fully the added value of P-O Fit to the position and institution, above and beyond reduced turnover and its associated costs.
Communication. The search firms are armed with a substantial amount of P-J Fit information from the job analysis undertaken for the Position Profile. The P-J Fit information has a deliberate and planned communication path by the search firm with the search committee during these phases. While the search firm is collecting information from the search committee via discussions, campus visits, and information request exchanges, both parties are actively communicating. The search firm produces the Position Profile, which is a document both the search firm and the search committee mutually negotiate and accept prior to implementation.

The search firms do understand the general concept of cultural fit, basic recognition of cultural fit, and the accompanying outcomes for a good fit in a presidential search, however in this phase P-O Fit communication and information gathering is deficient. The search firm does not produce a work document similar to the Position Profile for P-O Fit information. Both parties do not appear to be actively discussing P-O Fit issues or concerns during the finalist phase, however the search firms apparently do communicate some P-O Fit reaction to the search committee. The search firms are an “outsider” in the finalist phase, yet still in a consultative role creating awareness with the search committee about strengths and weaknesses of the finalists, which is inclusive of P-O Fit concerns. The communication in the finalist phase materializes as more of a one-way communication about cultural fit from the firm to the search committee, rather than the two-way communication that occurs during the normative phases.

The search firms perceive the search committees and Boards to have limited understanding of P-O Fit and interest in variables other than P-O Fit during the finalist phase. Search committees tend to be focused on P-J Fit variables, as one consultant voiced, “[search] committees tend to be interested in research, teaching, shared governance, fund raising, and beyond that committees tend not to have much more interest,” suggesting that P-O Fit is not
typically a priority of most search committees. The search firms’ perception of the search committees coupled with the traditional roles, expectations, and processes of the search firm offer insight into the limitation of P-O Fit communication. P-O Fit information and communication deployment with the search committee is an area of continued interest and opportunity for executive search firms conducting presidential searches.

Thus, the search firms conduct some phases of the search process more successfully with the search committees than other phases depending on the firm’s relationship as an “insider” or “outsider.” Within the “insider” relationship, the search firm and search committee experience a healthy relationship and distinctly understand role expectations due to traditional norms established from years of experience and attributes focused on P-J Fit. Within the “outsider” relationship, the search firm and search committee have a distant relationship and uncertain role expectations.

These deficiencies are mostly due to the search firms lacking development and advancement of P-O Fit components in their traditional search practice, ambiguity of P-O Fit, and the search committee’s lack of understanding and relevance of P-O Fit in the presidential search process. Limitations due to traditional norms underscore the opportunities for search firms to further develop and advance the practice of P-O Fit assessment, outcomes, and communication with the search committee in the presidential search process.

**Recommendations**

Not only did I personally learn a lot about the qualitative research process, but I also recognized essential lessons about the presidential search process from the viewpoint of the search firms. The presidential search process is time consuming, consists of many phases, and focuses on P-J Fit. My investigation of the executive search firm processes shaped important
concluding lessons: shifting role boundaries, traditional role expectations, and limitations due to tradition. These three lessons enable me to make recommendations for process improvements and future research of P-O Fit in higher education.

**Process Improvements**

The traditional presidential search process is a honed talent of the search firms. The traditional search firm process has produced predominantly successfully search placements of new college and university presidents. Even though the firms are very successful, approximately 5% of the searches fail according to the participants. Both failed searches and successful searches stand an opportunity to be improved. My goal is to provide recommendations that will help the search firms close the gap between being an “outsider” and an “insider” during some phases of the search. The inclusion of socialization, leadership fit, and improved communication of P-O Fit information will assist in closing the gap and improving the search process.

**Socialization.** I noticed from my analysis that AGB and the search firms were not discussing socialization. The 15-year old AGB Presidential Search Guide (AGB, 1997), referred to as the *AGB Process* by the search firms, is *the* guide for institutions of higher learning in selecting a president, yet does not mention a socialization process between search firms and committees. I found the missing link of socialization intriguing and actually a possible systemic reason why the relationships between the search firms and search committees studied were not stronger during some phases. The relationship between the search firm and committee were weaker when the search firms were an “outsider.” I sense from my analysis that in unsuccessful searches some issues remain unresolved within the search committees and with the search firm that are not addressed during the Position Profile development phase.
Therefore, some form of socialization led by the search firm prior to the Position Profile phase might create a better and healthier working relationship between both parties and bring the search firms from an “outsider” role closer to an “insider” role in those phases. Furthermore, it would help the search firms better understand the modern college and university.

Preferably the search firms should be included in the search committee development phase, as expressed by the search firm participants. Involvement in search committee development by the firms would be the ideal time for the socialization process to take place.

**Leadership fit.** Although P-J Fit and P-O Fit are important variables in the presidential search process, Leadership Fit appears to be an area that does not clearly find a place in the P-J Fit or P-O Fit discussions with participants and therefore does not get attention. Institutions have different states of operational health. There appears to be a need to consider the type of Leadership Fit required based on the current state of health of the institution at the time of the search. Institutions could be in a birth, growth, maintenance, or crisis state, which would require a leader who could successfully and effectively perform in that operational state. I would suggest search firms consider Leadership Fit with the current state of operational health of the institution and incorporate this concept into their process and communications with the search committee.

**Improved communication.** The search firms do an effective job of communicating P-J Fit information to the search committees. We know the communication of P-J Fit is easier for the firms because they are working with objective information and have traditionally developed norms for sharing communication and working together with the search committee. These traditional norms occur when the search firm is the “insider.” The subjective information and more distant relationships with the search committees, when the search firms are an “outsider,”
stifle communication of P-O Fit information. Communication could be improved through a standardized definition of P-O Fit, relevance of P-O Fit, and a Cultural Profile, not to mention a Leadership Fit commentary.

Search firms would benefit from a standardized definition of P-O Fit. We know the firms' professional language is *cultural fit*, however a standardized definition was not apparent from the participants' description of the concept. Researchers agree that P-O Fit is broadly defined as the compatibility between people and organizations (Kristof, 1996). In the employee selection literature, P-O Fit is conceptualized as the match between an individual and organizational attributes (Judge & Ferris, 1992; Rynes & Gerhart, 1990). A standardized definition of P-O Fit by the search firms would assist with improved communication of P-O fit to the search committees. Additionally, it would aid in explaining the relevance of P-O Fit and the development a Cultural Profile. A standardized definition would then allow search firms and search committees to work from a consistent foundation or understanding of P-O Fit.

We know P-O Fit is not a strong variable for consideration until the finalists' phase according to the participants. Another important process improvement is continued progress in the development of the relevance of P-O Fit to the position of college or university president and the institution for the search committee. Search firms should consider education and awareness with the search committee about P-O Fit earlier in the process instead of occurring during the finalists' phase. The search firms should begin the discussion and education of P-O Fit relevance with the search committees highlighting the consequences of P-O Fit such as improved job satisfaction, commitment, and reduced turnover earlier. Ideally this education would take place during the socialization process as previously discussed. The discussion of P-O Fit between both parties then could be more engaging in the finalist phase because the search committee would
have a better grasp of P-O Fit and the associated consequences. Search committees understanding the relationship between P-O Fit and consequences of good fit will serve in creating relevance that is weak at best today.

I would suggest search firms use their current successful model of P-J Fit communication as a guide for further developing P-O Fit information and communication. Search firms might consider the development of a Cultural Profile, analogous to the Position Profile. The information collected for the Cultural Profile could follow Deal and Kennedy’s (1982) five cultural elements: business environment, values, heroes, rites & rituals, and the cultural network to serve as an outline for the new Cultural Profile. The discussion and development of a Cultural Profile with the search committee would help facilitate more discussion about P-O Fit and provide a different format and venue for search firms to communicate the P-O Fit intelligence they are currently collecting as part of their process. I would recommend both parties sign this document as they do for the Position Profile creating a binding work document.

**Future Research**

Future research is needed on P-O Fit and presidential searches. These topics are overlooked in the higher education research. Recommendations for future research are exhorted by a noted scholar in organizational culture and from my study analysis. Surprisingly with such an important position as a college or university president, P-O Fit has not been empirically studied in the presidential selection process, much less from the perspective of the executive search firms that conduct these searches. Furthermore, when studies do examine P-O Fit, quantitative methods are the choice of most researchers, despite Edgar Schein’s (1990, 1991) recommendation that cautions researchers from using traditional quantitative methods to study organizational culture. Schein has suggested researchers approach studies of organizational
culture through qualitative methods because “organizational culture is a complex phenomenon, and we should not rush to measure things until we better understand what we are measuring” (Schein, 1990, p.118).

Ideally, Schein suggests that researchers “gather data in natural situations and where we [the consultants and researchers] are asked to help an organization, thereby get access to organizational situations where clients want something of us” or what Schein calls “clinical research when we are actively helping organizations” (Schein, 1991, p.3). Future research should explore and consider the feasibility of conducting P-O Fit studies of presidential searches by the executive search firm consultants that conduct the searches.

In addition to supporting and encouraging other scholars in following Schein’s recommendation for more qualitative studies to examine organizational culture, as in my study of P-O Fit, other important areas for further exploration and research need attention. The field of organizational culture and the associated literature would benefit from qualitative studies that examine P-O fit and the presidential search process from the perspectives of the search committees and Boards, presidents who have been recruited by a search firm, perceptions of the client institutions about the branding of the search firms, and the process of selecting a search firm by Boards and search committees. All of these research topic perspectives would build upon my study and provide greater understanding and depth to P-O Fit and the relationships between search firms and search committees in presidential searches.
References


Colleges.


mediating role of person-organization fit between CEO charismatic leadership and employee outcomes. *International Journal of Manpower, 26* (1), 35.


Lindholm, J. A. (2003). Perceived organizational fit: Nurturing the minds, hears, and personal


Washington, DC: Association for Higher Education.

symbiosis. *Organizational Dynamics,* 12 (Autumn): 52-64.


*Research in Higher Education,* 22, (2) 195-208.


McLaughlin, J. B., & Riesman, D. (1990). *Choosing a college president: Opportunities and

searches. *Change,* 21, (1) 44-57.

Washington, DC. Community College Press.

*Journal of Higher Education,* 44, 171-190.

Publications, Inc.


Appendices
Appendix A

Participant Invitation Letter

Date
Name
Address

Dear CEO [name]:

My name is J. Christopher Turpin. I am Vice-President of Human Resources at the Virginia Eye Institute in Richmond, Virginia as well as a Doctoral Candidate in the Higher Education Policy, Planning and Leadership program at The College of William and Mary in Williamsburg, Virginia. I am currently conducting research into experiences of executive search firms who conduct college and university president searches for my dissertation. The aim of this research is to explore the content and approaches that are taken in searches for public and private college and university presidents by search firms that specialize in these searches. I would like to invite you to participate in this research. In addition, I would like to ask for your support to contact no more than four of the firm’s executive search consultants to interview. It would be extremely helpful if you could provide me a list of names of search consultants, contact information, and their tenure with your firm for me to choose from to contact to participate in the study.

If you agree to participate you will be asked to take part in a 90 minute or less interview via your medium of choice: phone, Skype, video conference, etc. You will be given an opportunity to review the transcript summary from this interview and will be able to correct, clarify, or elaborate on any of your responses, if you so choose. This may require an additional one hour of your time.

The information collected will be used for research purposes only. The data will be kept confidential by storing it in a locked cabinet and will be destroyed when analyses are completed. Any trade secrets and operational aspects of your firm will be kept confidential and not discussed with any other firms participating in the study. In addition to the dissertation, the results of this study may be published in an academic journal and as a conference paper and may include quotations from your interview. A pseudonym will be used in place of your name and that of your firm and neither your identity nor your firm’s will be disclosed.

There are no known risks for participating in this study. Participation is this study is voluntary. You may refuse to participate, refuse to answer any questions, or withdraw from the study at any time with no consequences. Please find enclosed the Participant Informed Consent Form for you to read, sign, and return to my attention in the enclosed stamped addressed envelope.

If you have any questions about the conduct of the study or your rights as a research participant you may contact Dr. Thomas Ward, Associate Dean, School of Education at The College of William and Mary at (757) 221 - 2358 or tjward@wm.edu or my Dissertation Chair, Dr. Dorothy Finnegan via e-mail at definn@wm.edu If you have any questions about this
research, or any comments to make now or at a later date, or if you would like a copy of the published results of this study, please contact me, Chris Turpin, at the contact information below or my Chair Dr. Dorothy Finnegan via e-mail at definn@wm.edu. Please keep this letter for future reference.

To participate in this study please contact me at (804) 287-4268 or via e-mail: jcturp@gmail.com. I will follow up with you in approximately 10 business days to answer any questions and discuss your participation. Should you have any questions in the meantime please do not hesitate to contact me.

Best regards,

J. Christopher Turpin, SPHR
Vice-President of Human Resources
Virginia Eye Institute
Doctoral Candidate, The College of William and Mary
Participant Invitation Letter

Date
Name
Address

Dear Executive Search Consultant [name]:

My name is J. Christopher Turpin. I am Vice-President of Human Resources at the Virginia Eye Institute in Richmond, Virginia as well as a Doctoral Candidate in the Higher Education Policy, Planning and Leadership program at The College of William and Mary in Williamsburg, Virginia. I am currently conducting research into experiences of executive search firms who conduct college and university president searches for my dissertation. The aim of this research is to explore the content and approaches that are taken in searches for public and private college and university presidents by search firms that specialize in these searches. I would like to invite you to participate in this research. Your firm’s CEO has given me authorization to contact you about this study.

If you agree to participate you will be asked to take part in a 90 minute or less interview via your medium of choice: phone, Skype, video conference, etc. You will be given an opportunity to review the transcript summary from this interview and will be able to correct, clarify, or elaborate on any of your responses, if you so choose. This may require an additional one hour of your time.

The information collected will be used for research purposes only. The data will be kept confidential by storing it in a locked cabinet and will be destroyed when analyses are completed. Any trade secrets and operational aspects of your firm will be kept confidential and not discussed with any other firms participating in the study. In addition to the dissertation, the results of this study may be published in an academic journal and as a conference paper and may include quotations from your interview. A pseudonym will be used in place of your name and that of your firm and neither your identity nor your firm’s will be disclosed.

There are no known risks for participating in this study. Participation is this study is voluntary. You may refuse to participate, refuse to answer any questions, or withdraw from the study at any time with no consequences. Please find enclosed the Participant Informed Consent Form for you to read, sign, and return to my attention in the enclosed stamped addressed envelope.

If you have any questions about the conduct of the study or your rights as a research participant you may contact Dr. Thomas Ward, Associate Dean, School of Education at The College of William and Mary at (757) 221 - 2358 or tjward@wm.edu or my Dissertation Chair, Dr. Dorothy Finnegan via e-mail at definn@wm.edu If you have any questions about this research, or any comments to make now or at a later date, or if you would like a copy of the published results of this study, please contact me, Chris Turpin, at the contact information below.
or my Chair Dr. Dorothy Finnegan via e-mail at definn@wm.edu. Please keep this letter for future reference.

To participate in this study please contact me at (804) 287-4268 or via e-mail: jcturp@gmail.com. I will follow up with you in approximately 10 business days to answer any questions and discuss your participation. Should you have any questions in the meantime please do not hesitate to contact me.

Best regards,

J. Christopher Turpin, SPHR
Vice-President of Human Resources
Virginia Eye Institute
Doctoral Candidate, The College of William and Mary
Appendix B

IRB Consent Form

The College of William and Mary

The general nature of this study entitled “Executive Search Firms’ Consideration of Person-Organization Fit in College and University Presidential Searches” conducted by J. Christopher Turpin has been explained to me. I understand that I will be asked to participate in approximately a 90-minute interview via my choice of medium for the exchange of information. My participation in this study should take a total of about 90 minutes and additionally up to 60 minutes may be required to review and modify transcripts summaries of the interview. I understand that my responses will be confidential and that my name will not be associated with any results of this study. I know that I may refuse to answer any question asked and that I may discontinue participation at any time. I also understand that any incentive for participation will not be affected by my responses or by my exercising any of my rights. Potential risks resulting from my participation in this project have been described to me. I am aware that I may report dissatisfactions with any aspect of this experiment to the Chair of the College of William and Mary Protection of Human Subjects Committee, Dr. Lee Kirkpatrick, 757-221-3997 or lakirk@wm.edu. I am aware that I must be at least 18 years of age to participate. My signature below signifies my voluntary participation in this project, and that I have received a copy of this consent form. The participant’s names will not be divulged to anyone else who is participating in the study including anyone in the firm.

Date ___________________________ Signature ___________________________

Print Name ___________________________

THIS PROJECT WAS FOUND TO COMPLY WITH THE APPROPRIATE ETHICAL STANDARDS AND WAS EXEMPTED FROM THE NEED FOR FORMAL REVIEW BY THE COLLEGE OF WILLIAM AND MARY PROTECTION OF HUMAN SUBJECTS COMMITTEE (Phone: 757-221-3966) ON FEBRUARY 1, 2011.

If study subject has any questions in regard to this project, please contact the Principal Researcher directly: J. Christopher Turpin, jcturp@gmail.com
Appendix C

Interview Questions

Questions for the CEO of the Search Firm

a. How and why did your firm enter the higher education executive search market and in particular college and university presidential searches?

b. Does your firm have a specific niche that it cultivates? Is there competition in that niche? How much?

c. Do you feel that your firm has a sustainable advantage over your competition? If so, why?

d. Describe the involvement and role that your firm plays in the creation of the client-institution's search committee.

e. Please describe your firm's search process for a college or university presidential search.

   a. Is it different from your competition?

   b. If so, how?

f. How would you describe your success rate with college and university president placements?

g. When a search is not successful, please describe why it was not successful.

h. What sort of training does your firm supply to employees who conduct your contracted searches? How do you ensure the proper training?

i. What are the most important aspects of a search according to this firm?

j. How you know that your employees are following your firm's process?
Questions for both the CEO and firm search consultants

1. Please provide me any written materials and literature that describes your search process and policies, redacted or sample contracts, literature given to potential candidates and clients about your firm, and any other documents you feel may be helpful in my study.

2. When was your most recent presidential search?
   a. Would you please describe the process and the outcomes?

3. What does your firm seek to discover about the college or university that is employing you for its presidential search? Is this knowledge and understanding used in the search process? If so, how?

4. Do you request to review written materials and documents from client institutions?

5. Would you explain to me what you look for when you conduct a site visit?
   a. How much latitude do you have in your site visit? Do you control it or is it controlled by the institution?
   b. To whom do you talk? Why these people?
   c. What sort of information do you collect?
   d. To what extent do you investigate the institution on a lower than presidential role basis or with the Board and the Search Committee?
   e. Do you observe the operations and activities of the institution? If so, what do you look for?

6. How do you assess fit between presidential candidates and the client’s college or university? What are the components and criteria you assess? How much weight is
given to fit in making a recommendation for finalist to the institution? How do you think your competitor's would answer this series of questions?

7. Does fit impact the outcome of presidential searches? How do you think your competitors would answer this question?

8. What else would you like to tell me about your search process for college and university presidents?
Vita

James Christopher Turpin

Birthdate: December 23, 1965

Birthplace: Richmond, Virginia

Education:

2003-2012 The College of William and Mary
  Williamsburg, Virginia
  Doctor of Philosophy
  Higher Education Policy, Planning, and Leadership

1997-1999 American University
  Washington, D.C.
  Master of Science
  Personnel and Human Resource Management

1989-1997 University of Richmond
  Richmond, Virginia
  Bachelor of Applied Science
  Human Resource Management

Certification: 2000 Senior Professional in Human Resource Management
  (SPHR)

Experience:

2000-present Virginia Eye Institute
  Vice-President of Human Resources and Operations and
  Director of Human Resources

2008-present HR Upfront, LLC
  President and Founder

2004-2008 University of Richmond
  Adjunct Assistant Professor, Human Resource
  Management

2001-2004 University of Richmond
  Adjunct Instructor, Human Resource Management

  Senior Manager of Human Resources, Manager of Human
  Resources, Manager of Produce Operations, and Produce
  Manager