

EXECUTIVE DIRECTOR CANDIDATE BEHAVIORAL ANALYSIS

Information Package



CONSIDERATIONS WHEN HIRING AN EXECUTIVE DIRECTOR

One of the most important decisions a not-for-profit organization makes is in selecting a new executive director.

A robust application and interview process is essential for providing foundational information on potential candidates.

Adding a confidential *Behavioral Analysis* will provide significant, detailed information regarding the prospective executive director's operating style.

Benefits of including a *Behavioral Analysis*:

- ▶ Deep insight into the candidate's leadership and interpersonal style
- ▶ Tangible information to use in determining whether the potential candidate is a good match for the congregation and staff
- ▶ Confidence in understanding the candidate's behavioral style when making the hiring decision and for onboarding

The *Behavioral Analysis* can be applied to the hiring process in either of two different situations:

- ▶ Utilize the *Behavioral Analysis* with the top one or two candidates as part of the screening process.
- ▶ Complete the *Behavioral Analysis* on the newly hired executive director to aid in the effectiveness of the onboarding process.



THE BIRKMAN METHOD®

The tool to be used for the *Behavioral Analysis* is the advanced *Birkman Signature Report* which is a globally-recognized occupational and behavioral styles assessment.

The Birkman Method(R) is a nonclinical and nonjudgmental multi-dimensional assessment tool. This powerful measurement assists search committees in the assessment of a prospective candidate's behavior and in effectively onboarding a newly hired executive director.

Two key aspects measured by *The Birkman Method(R)* are self-perception and social perception.

- ▶ Self-perception reveals how we see ourselves. This identifies the candidate's typical behaviors in undertaking tasks, managing relationships and contributing to our world. Birkman names this as "Usual Behavior."
- ▶ Social perception identifies the candidate's underlying needs and expectations. The environment around the individual either meets or does not meet their needs, impacting their demonstrated behavior. This resulting behavior can either be effective or an ineffective stress behavior. Birkman labels this as "Needs."

Understanding the executive director's "Usual Behavior" and "Needs" is very useful in making a hiring decision and in onboarding. An in-depth written profile accompanies the Birkman report providing insight into the executive director's leadership and interpersonal styles.



THE WRITTEN PROFILE

An in-depth written report will be provided profiling the results from the executive director's Birkman questionnaire. The written profile will be roughly 20 pages long.

▶ Outline:

- ▶ Executive Summary
- ▶ Behavioral Style Analysis
 - ▶ Birkman Map (overview)
 - ▶ Nine Birkman Components
 - ▶ Interpersonal Style
 - ▶ Leadership Style
 - ▶ Organizational Style
- ▶ Summary of Considerations/*Areas to Be Aware of*
- ▶ How to Best Utilize a Birkman Analysis for a Hiring Decision
- ▶ How to Support an Executive Director in Light of a Birkman Analysis



SAMPLE PAGE FROM WRITTEN PROFILE

Leadership Style

When considering Leadership Style, think of these Birkman Components: Social Energy, Physical Energy, Assertiveness, Insistence, Incentives, Restlessness and Thought.

“Usual Style”: The candidate is all about relationships:

- ▶ Enthusiastic about working with people in groups and teams
- ▶ Friendly and meets people easily
- ▶ Finds it easy to relate to people in large groups and easy to talk to
- ▶ Has the ability to “read” groups
- ▶ Understands the value of teams spending informal time together to bond
- ▶ Builds teams based on trust and cooperation

The leader uses action as the key to solving most problems:

Works toward immediate benefits

- ▶ Objective and practical, excluding more subjective considerations which may cloud matters
- ▶ A matter-of-fact decision maker
- ▶ Spreads attention over several matters at the same time and doesn't hesitate to interrupt others
- ▶ Open to the influence of unexpected events on the long-term goal
- ▶ Leads with energy and a fast pace; initiates action and keeps things moving
- ▶ “Let's not talk about it – let's do it.”

It is easy for the candidate to exercise authority. Although not domineering, uses direct orders as an economical expression of what is to be done.



CONSULTATION PROCESS

Approximate length of time: 3-4 weeks.

Steps:

1. Confirmation of engagement
2. Search team shares specific concerns or questions regarding the prospective candidate/newly hired executive director
3. Candidate completes online questionnaire
4. Two-hour Zoom debrief of Birkman report with candidate and our Birkman consultant
5. Preparation of in-depth profile
6. Delivery of two-hour Zoom presentation and in-depth written profile to search committee



LETTER OF RECOMMENDATION

To Whom It May Concern:

This is to recommend Annette Miller of LifeSync Leadership, LLC for her Birkman services. Specifically, I'd like to highlight her *Executive Director Behavioral Analysis* services to aid not-for-profits in hiring and efficiently onboarding executive directors.

I've known Annette for 15 years and highly recommend her services based on her integrity and highly proficient work with the Birkman instrument. She ran my company for 11 years and since my retirement we've remained friends and colleagues working on various projects. I am very familiar with the Birkman and have been impressed with Annette's skill in interpreting and applying the Birkman information into actionable reports and workshops for organizations.

Her *Behavioral Analysis* service is particularly impressive. Her in-depth report is equal to any psychological assessment I've ever seen and her PowerPoint presentation is exceptionally well done.

In addition, Annette provides powerful team building workshops, helping to improve operations and increase relational effectiveness.

As a longtime friend and colleague of the late Roger Birkman, creator of *The Birkman Method*®, and a certified corporate and church leadership consultant myself for many decades, I can assure you that your committee's choice of Annette Miller's leadership assessment skills will pay dividends for your organization for years to come.

Respectfully,

Dan McGee, Ph.D.

Author, Consultant, Former Psychology Professor, Mental Health CEO



EXPERIENCE

Annette Miller, MBA

Ms. Miller has been a Birkman consultant since 2004 and has earned the designation of *Birkman Advanced Certified Consultant*. She has experience serving not-for-profit and for-profit organizations with *Behavioral Analyses* for leaders, team building workshops and executive coaching.

She has experience as a speaker at conferences and break-out sessions.

She has been president of her own consulting company for twenty years. Her clients come from across the United States.



REFERENCES

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A letter of recommendation from a confidential client can be provided upon request.



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