

## Finding the Right COO for Your Organization

The chief operating officers (COOs) Bridgestar encountered in our recent research<sup>1</sup> on the COO position came from a wide variety of educational and professional backgrounds. MBAs are fairly common, but other graduate training ranges from law degrees to social work degrees, and some COOs have no advanced degree at all. They may have spent their entire previous careers in one sector or moved among the nonprofit, government, and for-profit sectors.

Because the profile of the ideal nonprofit COO varies so widely from organization to organization, the key to finding the right person is to consider what qualities, skills, and experience will provide a good fit with the needs of your organization. Whether hiring for a newly created COO position or filling an existing position, each organization must chart its own course. However, through our interviews and our talent-matching work, we have found some practices that seem to increase consistently the chances of finding the right person.

### Know yourself and your organization

Just as candidates should go into the job search process with an awareness of their own abilities and interests, organizations and their leadership teams need to understand their side of the “fit” equation. The senior leadership of the organization—and the executive director (ED) in particular—should consider the qualities necessary for a new leader to work effectively with them and in the organization as a whole. A good fit usually doesn’t mean a clone of the ED or other senior managers, particularly if the organization is looking for someone who complements the skills and qualities of the existing team. However, it is useful to identify the specific dimensions on which you are looking for diversity versus those on which you need consistency.

Fit with organizational culture can be a particularly tricky issue. In January 2004, the Edna McConnell Clark Foundation commissioned the Bridgespan Group to study growth in US youth-serving organizations. Many of the 20 organizations participating in the study had created COO positions as part

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<sup>1</sup> Since January of 2004, Bridgestar and its members have been exploring the COO role through regular gatherings of executives in the co-pilot seat in their organizations for broad-ranging conversations about their work. In addition, we recently conducted a brief electronic survey of 23 COOs and a series of 16 in-depth interviews about the COO position with nonprofit COOs and EDs representing a diversity of industry sub-sectors, budget sizes, funding sources, organizational growth stages, geography, and individual backgrounds and tenures.

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of their growth, and most agreed that it was difficult to find the right person for this critical position, with several failing in their first attempts. They described the dilemma they faced looking for a person with the right management and operational skills who could also fit into the culture of their organizations. Both Geoff Canada (president and CEO of Harlem Children's Zone) and Steve Mariotti (founder and president of the National Foundation for Teaching Entrepreneurship, or NFTE) expressed regret about overriding concerns about fit with organizational culture in hiring key managers. After bringing on one COO who only lasted a year, NFTE eventually experienced success with a COO with years of corporate experience and the right personality for the job; Harlem Children's Zone reached inside for the right candidate and gained the advantage of someone with deep knowledge of the programs and credibility with other staff.

### **Define the role**

Defining the COO role is one of the most important prerequisites to finding the right person. Articulating clearly what the COO will do and how will help you figure out what you're looking for in a COO—and help position the person you eventually hire for success. The COO job description and reporting structure should correspond to the needs of your organization. Discussing what the organization hopes to do in the coming years, what kind of leadership will be necessary to fulfill those goals, and what role you expect the COO to play in relation to members of the existing senior team should start to provide you with a vision for the COO position.

If your organization is hiring its first COO, reviewing why you are creating the position will be a useful part of this process. Nonprofits usually introduce the COO position to accommodate one or more of the following needs:

- Reducing excessive ED workload and enabling the ED to allocate time to major external initiatives
- Building the organization's capacity to implement a strategic or growth plan
- Balancing or supplementing the skills of the ED
- Planning for ED succession

Your organization's reasons for creating the position should help dictate how it is defined and structured and what skills and qualities you seek in candidates.

### **Set realistic expectations**

This is a good point in the process to conduct a reality check: based on your initial assessment, is it realistic to think that the role and responsibility gaps you have identified can be filled by one person, or does the situation require a broader solution (e.g., restructuring the overall management team, adding

multiple positions, or adjusting the strategic plan)? If you have determined that your organization is otherwise well positioned to achieve its goals but requires the additional hire or restructured position to complete the team, then you can move forward with writing the job description and recruiting candidates.

### **Invest significant time in preparation and interviews**

Kathleen Yazbak, Bridgestar's Director of Talent and Recruiting, says that because the COO's range of duties is often so broad, hiring a COO is more like hiring an ED than like hiring a functional manager such as a CFO or director of communication. Style and fit with organizational culture are very important. As a result, it is essential that you invest significant time in interviewing and getting to know candidates. The ED in particular should spend enough quality time with each final candidate to get a sense of whether they will be able to work together productively and to determine if they have compatible value sets. This time should include at least one off-site meeting over lunch or dinner, late in the interview process. Getting together away from the office in a more social and relaxed setting will allow the candidate and the ED to get a better sense of personality and underlying values, which are critical to making sound hiring decisions.

Interviewers should not be afraid to ask hard questions of candidates and should expect to get hard questions from them as well. Being frank with candidates—which includes candidly discussing organizational challenges—gives them the opportunity to assess for themselves whether the position and the organization are a good fit for them. While the withdrawal of a promising candidate who decides he or she does not want to take on a particular challenge can be discouraging, it can save the organization from wasting precious resources on hiring the wrong person.

Based on Bridgestar's experience with COO searches, organizations that use these techniques significantly improve their chances of hiring COOs who fit well with the position, the organization, and the leadership team. Hiring a COO who is a good fit is an important piece of ensuring that the COO is effective in helping the organization to meet its objectives.

### **Questions every organization hiring a COO should ask**

The list below include both questions to help you assess specific candidates (either to ask directly or to consider) and questions to help you determine what your organization needs in a COO.

#### **Questions about your organization**

What are your organization's major strategic plans and goals?

What does your organization need to make those plans a reality and achieve those goals?

What are the roles and responsibilities of the current staff? What are their strengths and weaknesses? How are they aligned to help your organization achieve its goals?

What role and responsibility gaps begin to emerge? What skills and qualities do you need to balance those of the existing leadership team? How can the position be defined and structured to fill the gaps?

What aspects of your organization's culture are most important to consider in terms of candidate fit?

### **Questions about the ED and the ED-COO relationship**

What kind of a manager is the ED? What qualities does the COO need to thrive under this ED?

Is the ED looking for a COO who will enable the ED to spend less time on internal matters? A thought partner? Someone to translate vision into action? Someone to "translate" between the ED and the staff?

Is the COO part of a succession plan for the ED—either with the COO becoming ED or the COO helping to maintain organizational memory through ED turnover? What is the ED's timeline in his/her position? What timeline do you envision for the COO?

How does the ED envision the two working together? How will the two work to further define the COO role and build the ED-COO relationship? How will communication between the ED and the COO work? How will the ED and COO manage internal communication with staff?

How open is the ED to working in partnership with the COO? To what extent does the ED understand and value the role of a COO? What qualities will the COO need to have in order to gain the confidence of the ED so the ED can delegate important functions? Is the ED ready to hand off key pieces of his or her job?

On what issues and guiding principles does the ED think it is most important that the two be aligned?

If one of the reasons for hiring a COO is to balance out some of the ED's weaknesses as a manager, what are those weaknesses?

What biases does the ED have around the COO role (e.g., a concern that the COO might constrain the ED's vision or that the COO will create unnecessarily expensive or complex systems)? What processes need to happen and/or what qualities does the COO need to have for the ED to overcome those biases?

### **Questions about the position**

What is the organization hoping to accomplish by hiring a COO?

If the position is new, why is it being created? If it is being restructured, what are the reasons for the change?

How will the position's role and responsibilities be defined? Will the position focus on program, administration/operations, all internal matters, or some variation on these models? How might the position change in the years to come?

What skills and qualifications are you looking for in a COO? Which of these things are must-haves, and which are negotiable?

What, if any, organizational changes are you hoping to make through the COO position? What obstacles exist to making those changes?

What will be the COO's role in any major strategic initiatives the organization is undertaking or planning to undertake?

What will be the organizational/reporting structure? Will the COO be second in command to the ED? Will there dotted-line/matrix relationships, and if so, how will they be handled?

What are the dynamics of the current relationships between the staff and the ED? How will a new person (and, if applicable, a new or restructured position) change these relationships? Is the staff supportive of these changes? How will the dynamics and communication patterns between the ED and staff need to evolve when the COO is in place? What communication has there been with staff around these changes, and what additional communication is needed?

What authority will the COO have? What decisions can the COO make alone, what decisions will be joint between the COO and someone else, and what decisions will be out of the COO's hands? Whom will the COO supervise?

What will be the relationship between the COO and the board?

What do members of the leadership team see as the key challenges for the COO? Key success factors?

What is expected of the COO on the part of the ED and others? How will the COO's performance be evaluated? What are the criteria? Who will play a part in the evaluation? Are adequate resources available for the COO to carry out what is expected of him or her?

### **Questions about candidates**

Does the candidate have the necessary skills, experience, and temperament to be a COO generally? To fit this position in particular? To fit this organization?

What resources (network, mentors, etc.) can the candidate and the organization access to fill in any gaps in skills or experience?

What is the candidate looking for in a supervisor? How much autonomy does he or she want and/or expect? Does the candidate work best with a hands-on supervisor or one who doesn't intervene unless asked?

Is the candidate interested in becoming an ED at some point? Could the candidate step in as ED on an interim basis if necessary? What does the candidate see as his or her timeline in the COO position?

Is the candidate comfortable with being second in command (or being on a par with other senior managers, depending on how the position is structured), and doing a large proportion of his or her work behind the scenes?

Is the candidate someone the ED can grow to trust enough to delegate critical organizational priorities to him or her?

**Bridgestar** ([www.bridgestar.org](http://www.bridgestar.org)), an initiative of the Bridgespan Group, provides a nonprofit management job board, content, and tools designed to help nonprofit organizations build strong leadership teams and individuals pursue career paths as nonprofit leaders.