



- Human Capital Management Firm
- Professional Services include:
  - Executive Search
  - Leadership Development Services
  - Human Resources Consulting
  - Transition, Succession, Onboarding, Coaching
  - Governance and Board related services
  - Organizational Development Consulting

# Paul Chou



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## **Co-Managing Director & Senior Client Partner** **Global Education Practice** **Korn Ferry International**

Leveraging over 30 years of professional experience as an academic, business professional, and search consultant at an international executive search firm, Paul Chou brings a proven record of success, credibility, sound judgment, and extensive knowledge about leadership to a broad range of not-for-profit clients regarding executive level placements, succession planning, and leadership assessment. His portfolio includes senior academic leadership placements for a variety of education clients, in addition to executive-level searches conducted for organizations with a significant educational component.

Paul's recent assignments represent relationships with a broad range of distinguished public and private academic institutions in North America and Asia. His experience includes a diversified portfolio of senior level placements at major AAU research institutions, liberal arts colleges, and a variety of leading professional colleges and schools.

Complementing his academic search work, Paul has also led many senior executive searches for

nationally recognized foundations, museums, public policy, fine and performing arts schools, and scholarship organizations.

Paul began his professional career as a software engineer at Fonar Corporation, and subsequently held various senior information technology positions at several Wall Street firms, including PaineWebber and Balfour, Maclaine Corporation.

Paul is a professional violinist and conductor whose performances have been met with critical acclaim by domestic and international audiences. While occupying the Ronald J. Ulrich Endowed Chair of Orchestral Studies in the Department of Music at Lehigh University, Paul also served as a Development Officer focusing on corporate/foundation relations and major donor cultivation.

Paul received his B.Mus., with high distinction, from Indiana University-Bloomington and his M.Mus. from the State University of New York at Stony Brook.

# Karen Huang, Ph.D.



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## Senior Manager Search Assessment Korn Ferry International

Karen H.C. Huang, Ph.D., is a Senior Manager of Search Assessment for Korn/Ferry International, based in the Firm's Washington, D.C. office.

With over two decades as a psychologist, Dr. Huang brings valuable insights to the leadership assessment process and has assisted hundreds of clients from diverse industries in identifying optimal candidates for executive positions. She administers and interprets the Firm's proprietary Search Assessment tool, develops job and culture profiles used to benchmark candidates, and is responsible for maximizing Korn/Ferry's use of assessment on all executive searches covering the Washington, D.C., Northern Virginia, Miami, and Atlanta offices.

Dr. Huang joined Korn/Ferry after a career in higher education where she had progressively higher levels of responsibility. She began as a psychologist at Stanford University providing the full range of psychological services, supervising clinicians in training, and managing the quality assurance and faculty consultation programs.

Following Stanford University, Dr. Huang joined

Lehigh University as a psychologist, served as interim director of the Women's Center, and then was appointed the founding director of the Office of Graduate Student Life. In that role, she established and provided leadership for a wide range of student services for Lehigh's 2,000 graduate students.

Dr. Huang's professional experience includes: co-facilitating for a Stanford University M.B.A. course; teaching psychology courses at Stanford University, UC Berkeley and Lehigh University; conducting diversity training and other talent development programs; and developing a 360-degree feedback survey.

Dr. Huang earned her doctor of philosophy, masters, and bachelor of arts degrees (with honors) in psychology from the University of California, Berkeley. She completed her pre- and postdoctoral training at Harvard Medical Center training sites.



KORN FERRY

EXECUTIVE SEARCH &  
LEADERSHIP ASSESSMENT

# Agenda

- Executive Search
  - Context and Process Overview
  - Job Specification
  - Interview strategy
- Korn Ferry 4 Dimensions of Executive Assessment (KF4D)
  - What it measures
  - How to use it
  - How to interpret your results

# Continuing the Houston discussion....

## **Houston Discussion**

- Preparing for Career Advancement
- Search Process
- Evaluation Criteria
  - Experience - Functional Knowledge
- Leadership Competencies

## **Where we left off:**

- Context and Process Overview
  - Your Preparation
  - Strategy
- Job Specification – determining evaluation categories
  - Experience – Functional Knowledge
  - Leadership Characteristics and Style– Institutional Expectations
- Identify/Articulate How You Align
- Interview Strategy

# Higher Education Leaders...

- *Take the School/College/University to the next level of distinction in academic excellence*
- *Provide inspirational leadership for faculty, students, staff, donor partners and professional colleagues*
- *Create intellectual capital, through attracting, supporting, and retaining leading scholars*
- *Bring multi-disciplinary projects to fruition within and across institutional units*
- *Ensure operational excellence*

Strategic (global) vision: define the strategic priorities in collaboration with diverse stakeholders

Transparent decision-making and consensus building

Innovative thinking

Informed understanding of market trends within disciplines and higher education

Leading in times of change

Evolving, dynamic environments fraught with ambiguity

Appetite for the opportunity that change brings

Create a collegial and inclusive environment

Interpersonal effectiveness with a wide range of stakeholders (students, parents, alumni, donors, business leaders, media, administrators, government, academics leaders, etc.)

Chief fundraiser

Ambassador/spokesperson who builds the brand with external constituencies

Networker who leverages and enhances high-level relations with external and internal communities

Advocate for students, faculty, and staff success

# Rise of Leadership Assessments

- Russell Reynolds & Hogan Assessments partnership
- Witt Keifer: Uses Hogan Assessments
- Spencer Stuart: Executive Intelligence<sup>®</sup> “case” interview
- Heidrick & Struggles: Leadership Signature<sup>®</sup> online
- DHR International: Leadership Style Indicator<sup>®</sup> online
- Caldwell Partners partnering with Caliper
- ALC Advisory: ALC Insights

# Getting the “whole person” view

We believe human performance in the workplace is governed by four factors



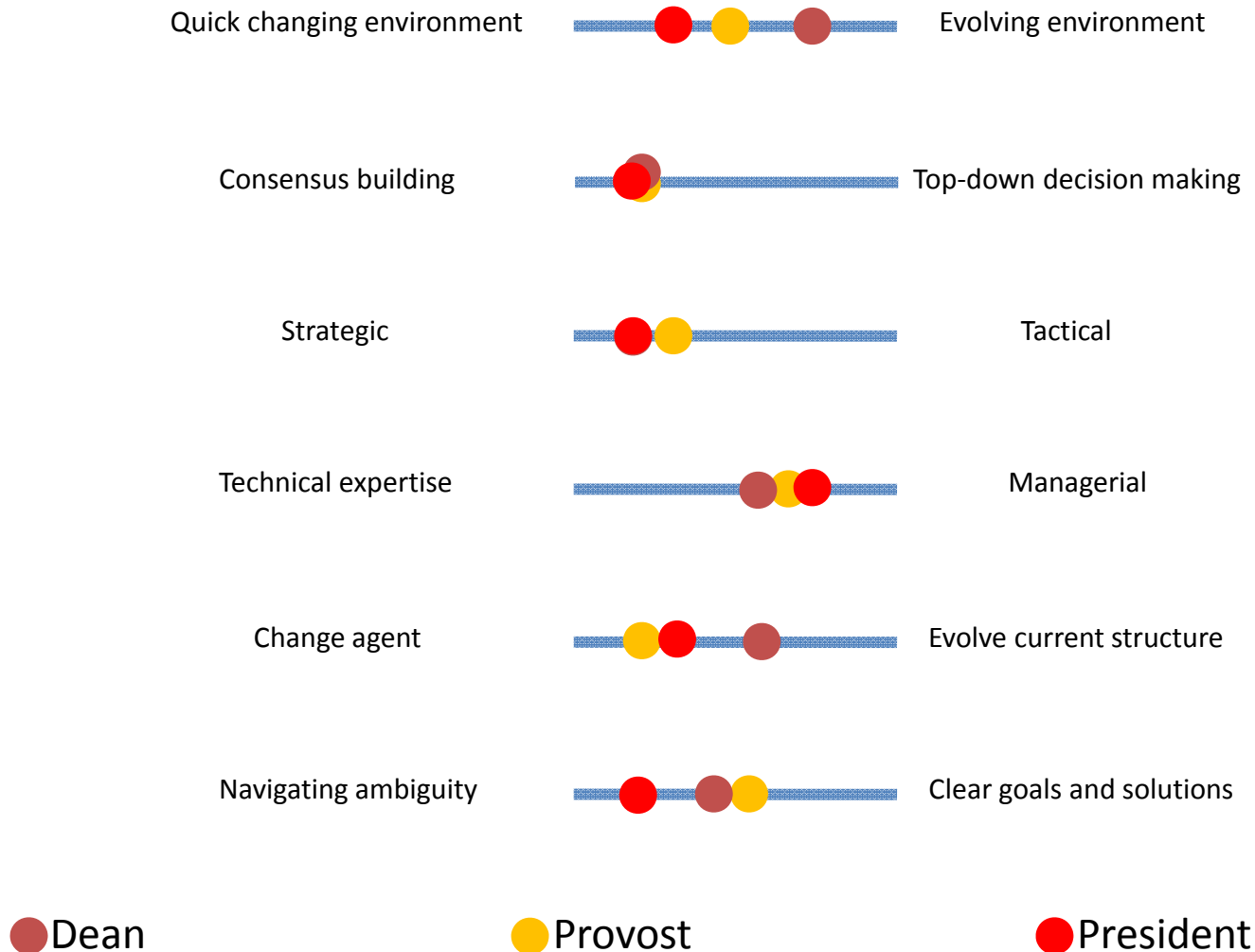


# Unique Client Profile

## Leadership Competencies

Competency	President	Provost	Dean
Aligns Execution			
Balances Stakeholders			
Courage			Mission Critical
Cultivates Innovation	Mission Critical	Mission Critical	
Develops Talent		Mission Critical	
Engages and Inspires	Mission Critical	Mission Critical	Mission Critical
Ensures Accountability	Mission Critical	Mission Critical	
Global Perspective			
Manages Ambiguity			
Manages Conflict			Mission Critical
Navigates Networks			Mission Critical
Nimble Learning	Mission Critical		
Persuades			
Situational Adaptability			
Strategic Vision	Mission Critical	Mission Critical	Mission Critical

# Unique Client Profile: Position Analysis



# Unique Client Profile: Organizational Culture



# You completed the KF4D assessment self-reported on three dimensions

- **14 Personality Traits** – *personality attributes that exert a strong influence on your behaviour, like attitudes, such as perseverance, and other natural leanings, such as sociability.*
- **15 Leadership Competencies** – *observable behaviors that have an impact on your performance and results.*
- **6 Drivers** - *values, motivators, energizers, and aspirations that influence an individual's engagement in a role and organization.*

# Traits

14 traits scales comprise 3 Superfactors:

## Social Leadership

*Influence, collaboration, and interpersonal awareness that advances collective goals.*

## Agility

*Adaptability, curiosity, and innovative thinking in conditions of ambiguity and risk.*

## Energy

*Vitality, resilience, and drive for achievement in spite of obstacles.*

# Social Leadership

- + Engagement, influencing people and strategic vision
- Roles with technical expertise

Traits	Social Leadership Superfactor
Affiliation	A preference for working with others.
Composure	Remain calm and composed in stressful situations.
Empathy	Concerned with and aware of other people's feelings, motivations, and problems.
Influence	Enjoy motivating and persuading others.
Situational Self-awareness	Maintain receptive and non-judgmental attention to the present situation (i.e. "mindfulness").
Sociability	Enjoy interacting with people.

# Agility

- + Engagement, career success & management level, quick change, ambiguity
- + Elevated in innovative cultures
- Jobs with high technical expertise

Traits	Agility Superfactor
Adaptability	Comfort with unanticipated changes of direction or approach.
Curiosity	Likely to tackle problems in a novel way, see patterns in complex information and pursue deep understanding.
Focus	Prefer clear organization, procedure, and exactitude.
Risk Taking	Willing to take chances or to take a stand despite limited information.
Tolerance for Ambiguity	Comfort with uncertain, vague, or contradictory information that prevents a clear understanding or direction.

# Energy

- + Engagement, career success & management level
- + Elevated in innovative cultures
- High technical expertise
- Lower in collaborative cultures

Traits	Energy Superfactor
Assertiveness	Enjoy taking charge and directing others.
Need for Achievement	Prefer to test one's skills and abilities against an external standard.
Persistence	Passionate and steadfast in pursuit of personally valued long term or lifetime goals, despite obstacles, discouragement or distraction.



# Assertiveness

- The degree to which people enjoy taking charge and directing others
- High scorers tend to be seen as aggressive and decisive
- Low scorers are often perceived as deferential, passive, or indecisive, and may be more comfortable following the lead of others



## **TOO HIGH**

- Take charge too readily
- Too directive; overbearing
- Step in too quickly to intervene
- Too decisive; don't listen openly

## **TOO LOW**

- Disinclined to impose goals or direction
- Step back rather than intervene
- Too reserved or reticent
- Too deferential

# Assertiveness Questions

- How do you know when to delegate decision making and when to exert authority?
- Tell me about a time when you had to take a very strong stand. What did you say and do?
- Describe a time when you had to remove a barrier in order for an interdisciplinary team to continue work.
- Tell me about a time when you took charge of a group you thought was dysfunctional, and you convinced the members to do something different.
- Describe a time when you had to lead people who didn't want to be led.
- Describe a time when you had to lead an open debate on a tough issue.
- Compare and contrast instances of when you've been effective and ineffective at taking charge of a tough situation.
- Describe a time you had to get consensus among stakeholders with strongly differing opinions.

# Leadership Competencies

15 competencies comprise 4 Clusters:

Thought	People	Self	Results
<i>Thinking through problems and solutions</i>	<i>Understanding and managing people</i>	<i>Managing one's feelings and reactions</i>	<i>Achieving goals</i>

## Thought

Competency	Definition
<b>Balances Stakeholders</b>	Anticipating and appreciating the varying needs of all parties invested in outcomes.
<b>Cultivates Innovation</b>	Creating new and better ways for the organization to be successful.
<b>Global Perspective</b>	Taking a broad view when approaching issues, using a global/holistic lens.
<b>Strategic Vision</b>	Seeing ahead to future possibilities and translating them into breakthrough strategies.

# Strategic Vision

- Seeing ahead to future possibilities and translating them into breakthrough strategies
- High scorers can “see the big picture” and can articulate future possibilities
- Low scorers underestimate the pace of change and work to keep up with, instead of get ahead of, competitors



## **TOO HIGH**

- Gravitate toward future possibilities and focus less on current realities
- Push for breakthroughs that the institution is not ready to implement
- Too theoretical, think to big

## **TOO LOW**

- More focused on short term tactics
- Prefer to focus on the here and now
- Not good at thinking, “What if?”
- Lacks perspective to pull together varying elements into a coherent strategic view

# Strategic Vision Questions

- Tell me about a time you developed a strategy that helped your institution improve its competitive advantage.
- Tell me about a time when you provided a strategic perspective to a person's complaint and thereby reduced it?
- Describe a situation in which you established a new vision and set a strategic course.
- What are two or three things that are going to happen beyond the current year that are going to make a big difference in how we achieve success?
- Tell me about a time when your attempt to be strategic got you in trouble.

# Competencies

## People

Competency	Definition
<b>Engages and Inspires</b>	Creating a climate in which people are motivated to do their best to help the institution achieve its objectives.
<b>Develops Talent</b>	Developing people to meet both their career goals and the institution's goals.
<b>Manages Conflict</b>	Handling conflict situations effectively with a minimum of noise.
<b>Navigates Networks</b>	Effectively building formal and informal relationships networks inside and outside the institution.
<b>Persuades</b>	Using compelling arguments to gain the support and commitment of others.
<b>Situational Adaptability</b>	Adapting approach and demeanor in real time to match the shifting demands of different situations.

# Engages and Inspires

- Creating a climate in which people are motivated to do their best to help the institution achieve its objectives.
- High scorers can paint a compelling vision that arouses passion and excitement, encouraging greater achievement than was thought possible.
- Low scorers build culture around values that do not resonate with staff and faculty, leading to pushing/driving more than inspiring.



## TOO HIGH

- Leave others behind by being focused too far in the future
- Take too much responsibility for other people's motivation and commitment
- Cheer others on without holding them to high standards

## TOO LOW

- Assume a vision will “cascade” throughout the organization
- “Push” more than inspire



# Engages and Inspires Questions

- Tell me about a time you turned around highly disengaged community member(s).
- Tell me about a time you led a group that was heading south and you wanted them to head north.
- How do you “rally the troops”? Describe a time when you had to motivate a less-than-engaged faculty member or department.
- Describe a time when you had to motivate different groups differently.
- What’s your method for understanding an individual’s personal values and goals in order to inspire him/her to donate to your institution’s goals?
- Tell me about a time you helped to energize a department that had become complacent.
- Tell me about a time you shared a vision in order to motivate people when times were tough.
- Tell me about a time you motivated a department or group to achieve more than it thought possible.

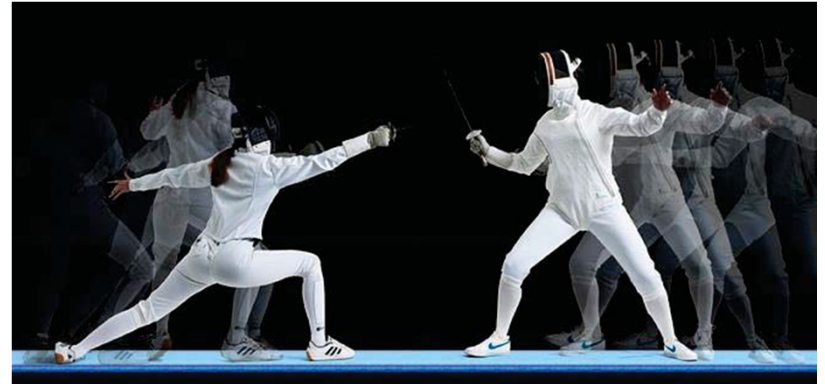
# Competencies

## Self

Competency	Definition
<b>Courage</b>	Stepping up to address difficult issues, saying what needs to be said.
<b>Manages Ambiguity</b>	Operating effectively even when things are not certain or the way forward is not clear.
<b>Nimble Learning</b>	Actively encourages individuals and teams to learn through experimentation when tackling new problems, using both successes and failures as learning fodder.

# Nimble Learning

- Learns through experimentation when tackling new problems, using both successes and failures as learning fodder.
- High scorers embrace risk associated with experimentation and create a culture of exploration. They learn from their mistakes and are tolerant of progressive failure.
- Low scorers dwell on failure, which may deter exploration.



## TOO HIGH

- Overly willing to invest in riskier experimental approaches
- Overly tolerant of risk to the bottom line
- Take unnecessary risks

## TOO LOW

- Low tolerance for failure
- Lack optimal patience for experimentation
- Less likely to reflect on successes and failures in a productive and positive manner

# Nimble Learning Questions

- Tell me about a time you analyzed a failure in order to promote institutional learning.
- Describe a time when you encouraged the institution to try multiple times to find the right solution.
- Describe a time when you set up a cultural practice that fostered openness to learning and tolerance of mistakes.
- Tell me about a time when you needed to learn something new very quickly and initially faltered.
- Describe a time when a mistake or failure directly led to a successful solution.

# Competencies

## Results

Competency	Definition
<b>Aligns Execution</b>	Planning and prioritizing work to meet commitments aligned with organizational goals.
<b>Ensures Accountability</b>	Holding self and others accountable for meeting commitments.

# Drivers

- ***Balance: integrating work and life in a sustainable, enjoyable way***
  - I want to develop myself outside of work, enjoy my life and pursue interests outside of work.
- ***Collaboration: working with others toward a common goal***
  - I want to build consensus, use my social skills to get things done and build strong partnerships.
- ***Power: seeking influence and recognition***
  - I want to have status, visibility and /or income.
- ***Challenge: learning, growing, pushing oneself***
  - I want to achieve the impossible and beat the competition.
- ***Structure: working in a process-oriented, stable environment***
  - I want a stable and predictable job, and to maintain my high expertise and specialized knowledge.
- ***Independence: working without imposed constraints***
  - I want to make my own rules, be free of organizational constraints, and be an entrepreneur.

# Collaborates and Builds Consensus

- The degree to which individuals prefer work-related interdependence, group decision making, group-based goal setting and pursuit.
- High scorers prefer to be part of teams, build consensus, share responsibility, and rely on social behavior for work-related success.
- Low scorers prefer work characterized by limited reliance on social behavior, independence and being primarily responsible for his/her own work and decisions.



## **TOO HIGH**

- Overly consensus driven; struggles to make decisions in a timely manner
- Too accommodating, finding it difficult to make tough decisions

## **TOO LOW**

- Value own interests over others'
- Don't encourage communications between groups
- Impatient with group processes
- Prefer self-reliance

# Collaborates and Builds Consensus

## Questions

- Describe a time when you had to deal with a person or group who could only see their side of the issue.
- Describe a time when you were asked to lead faculty who were at odds with each other.
- Tell me about a challenging situation when you worked to earn trust and credibility with your faculty.
- Tell me about a time when you succeeded in an initiative by collaborating with people outside your area of expertise.
- Tell me about a time when you had to separate liking a group from collaborating with them.
- Tell me about a time when you had to figure out the hidden agendas within a group.
- Tell me about a time when you read non-verbal behavior of a group and this paid off for you.
- What was the biggest success you ever had in trying to collaborate with people who didn't want to collaborate with you?
- Where would you put yourself on a loner-to-team-player scale? Give an example.
- Tell me about a time when you had to deal with a potential funder who was very unreasonable.
- Tell me about a time when you had to get along with someone with a very different cadence from your own (very slow, fast, detail oriented, mercurial, etc.).



# Independence

- The degree to which an individual prefers independence and an entrepreneurial approach to work activities.
- High scorers prefer freedom from organizational constraints, setting and pursuing their own vision, and value employability more than job security within a particular company.
- Low scorers prefer pursuing group defined goals, structured organizations, and prefer to identify strongly with a particular organization



## **TOO HIGH**

- Feels limited by organizational structure and processes
- Pursues own vision
- Prefer the freedom to make independent decisions

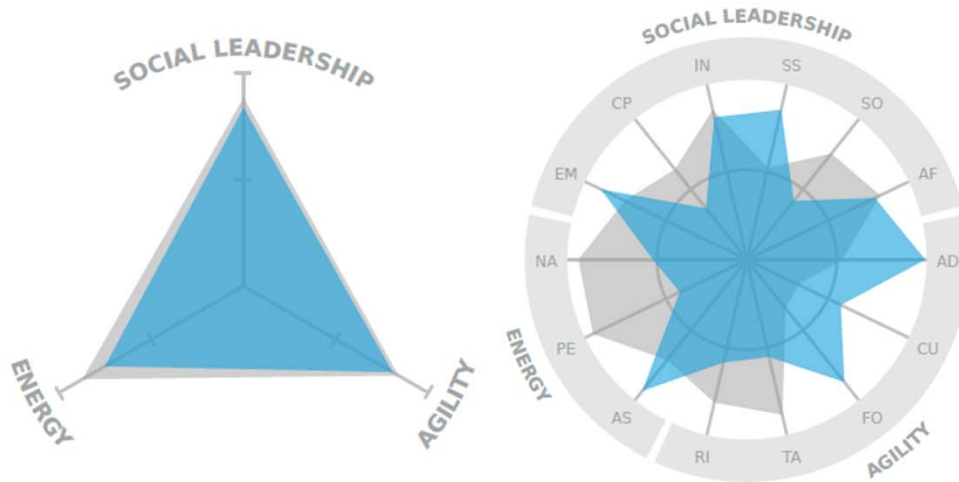
## **TOO LOW**

- Loyal to the institution
- Less self-reliant than ideal
- Less entrepreneurial than ideal

# Independence Questions

- Describe a time when you wanted to disregard stakeholder input and pursue your own vision.
- Tell me about a time you thought organizational processes would get in the way of you achieving results.
- Tell me about a time when you seized an opportunity and moved forward with it on your own.
- Describe a time when you had to compromise what you believed in order to fit in or "get along".
- Tell me about a time when your independence got you in trouble.
- What do you do in a group when you feel like others are holding you back from moving forward?

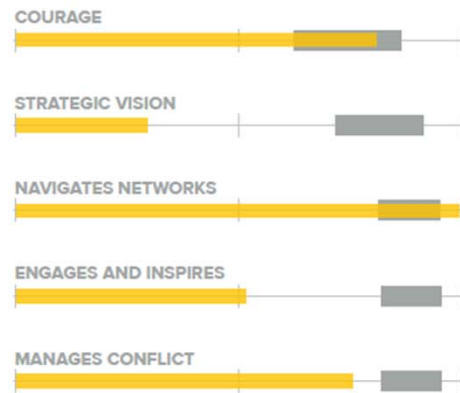
# Sample Assessment Results



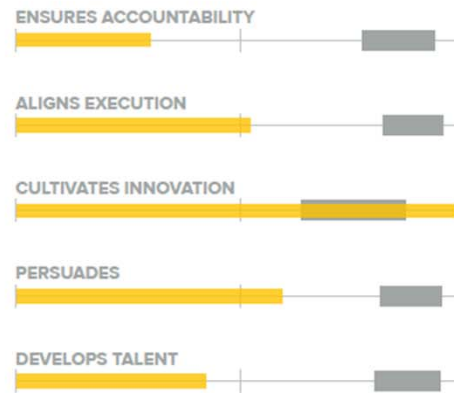
INTENSITY OF DRIVERS:



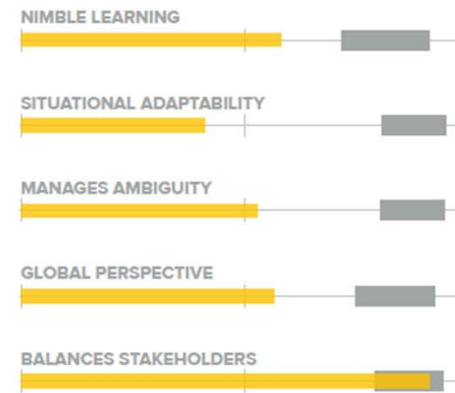
## MISSION CRITICAL:



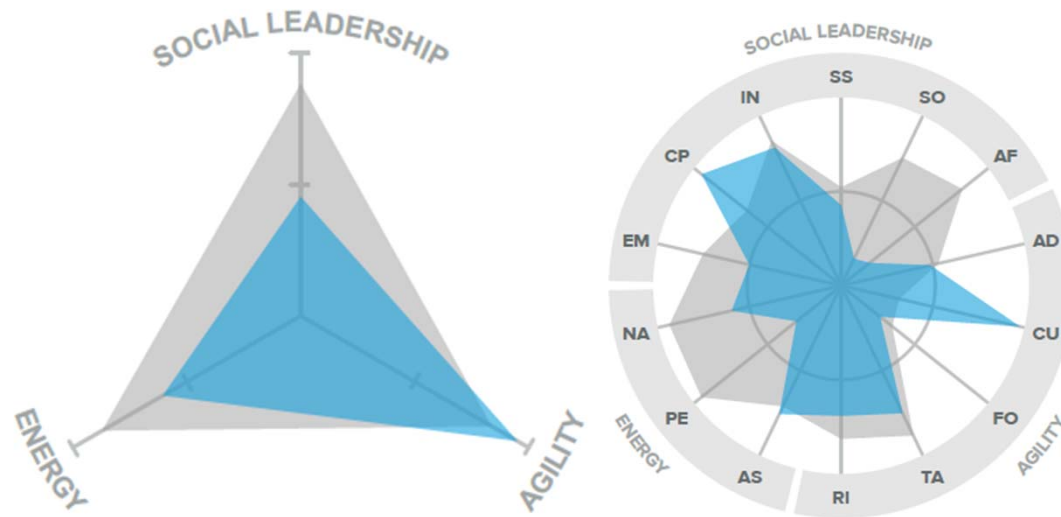
## CRITICAL:



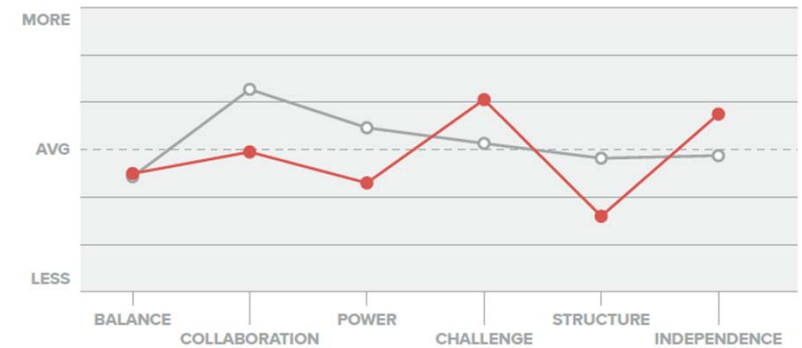
## LESS CRITICAL:



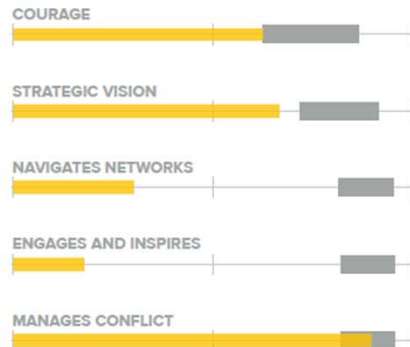
# Sample Assessment Results



INTENSITY OF DRIVERS:



## MISSION CRITICAL:



## CRITICAL:



## LESS CRITICAL:

