

# The Executive Director: An Opportunity Worth Considering

*Usually second to the CIO, the executive director brings high-level leadership and management to the organization, the campus, and the community*

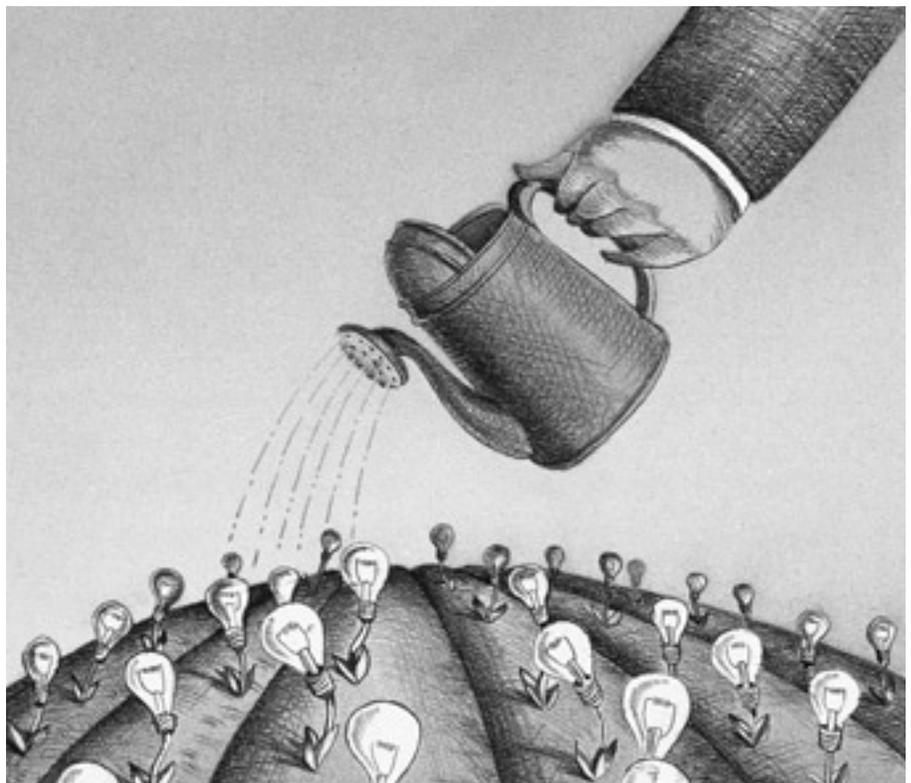
By **Carrie E. Regenstein**

Much has been written recently about the role of the higher education chief information officer (CIO) and the qualifications expected of potential candidates. As you consider career paths for senior information technology (IT) leaders, you might also seek a better understanding of another senior position in higher education's IT arena—the role of executive director.

Position titles mean different things in different places, of course. In some institutions, the executive director is the sole IT leader, much like the CIO in other institutions. Elsewhere, “executive director” might be used to mean “deputy CIO” or “associate CIO,” that is, second in command. Regardless of the title assigned to any functional IT position, the benefits of serving as an executive director (by any title) are worth investigating. Let's explore why and how.

## **Leadership, Management, and Dividing the Work**

The role of higher education CIO has grown beyond the ability of any single individual to handle, especially at large, complex institutions, regardless of that person's extraordinary talent. With this change has come the opportunity to share the work with a partner—an executive director.



The addition of a trusted partner isn't just about lessening a CIO's workload. At the simplest level, a second IT leader who can be called upon if the first is unavailable provides an advantage to the institution. More important, an institution can reap the benefits of having two highly trained minds rather than one. The dynamics of partnership

in leadership can produce a qualitative improvement often unexplored in slavish adherence to the notion “There must be one, clear leader!”

Let's define an executive director as the number two in the IT organization, reporting to a CIO. The relationship might be purely hierarchical. It is, however, also possible to achieve some kind

of co-leadership of the organization, as the executive director often plays a key leadership role on campus and sometimes beyond.

Some aspiring CIOs may have shunned the idea of serving as an executive director for fear that the role is purely tactical. They assume that the CIO leads strategic work on campus while the executive director manages operational work within the confines of the central IT organization. This model indeed makes it difficult to progress through an executive directorship to a CIO position. Moreover, the focus on managing operational work will not attract talented higher education leaders to these positions. This is not the only model for the executive director, however. Consider instead the model of shared tactical and strategic leadership.

### **Requirements for Success**

No magic formula helps determine the division of labor between CIO and executive director. The key to success is not the designation of who does what but rather the agreement of both parties as to each one's role, supported by a smooth flow of communication and work between the two. This dialogue needs to start—candidly but professionally—before the partnership forms and must continue throughout its lifetime.

Successful partnerships are based on a shared vision for the institution and the organization, clear definitions of roles (but not so rigid as to preclude flexibility), and a relationship based on honest communication and trust. By necessity, such negotiations and work require that each person demonstrate self-awareness and maturity. It's fine for either or both people to be ambitious and to want to be the best they can be; it's far less effective for the two to see themselves as competing.

Success depends on how a given pair of leaders chooses to divide the opportunities and challenges. According to Northwestern University Executive Director Patricia Todus and CIO Mort Rahimi, successful partnerships focus "more on function than on hard lines of authority."<sup>1</sup> Rahimi said that "mentoring can go both ways." He

explicitly "depends on Todus for strategic support because of IT's increasing importance."

Here at Carnegie Mellon, Vice Provost and CIO Joel Smith and I find that our collective attention to both strategy and operations helps ensure that each endeavor is well informed, resulting in feasible strategies and (we hope) more meaningful day-to-day work for the organization. Following up on our strategies, I provide leadership on the organization's cultural and quality-of-life issues and concerns. Then again, this is an area of work in which I have experience and that I enjoy doing. The division of work between us thus falls along natural lines of responsibility and inclination.

### **Operational Work Included**

Now, before you start sending in letters of application for positions you might not like, let me be clear. Serving as an executive director generally does include a lot of operational work.

Soon after my arrival at Carnegie Mellon in September 2005, we learned that we needed to move 25 percent of our staff to another facility while trying to encourage more teamwork among departments that had only worked together for about a year. Although I had strategic responsibility for our architectural roadmap and new middleware infrastructure, by necessity I spent many cycles helping staff accept (and maybe even like) the move and their new spaces. Problematic cultural issues abounded, from the flavor of the coffee to the price of discounted soda in our break rooms. When one of our leaders had us write limericks to define our work, I wrote:

*Well, I came to be part of the top  
Of a place that just can't seem to stop.*

*I lead roadmaps and plans,  
Org alignments so grand,  
Not to mention space, java, and pop.*

Make no mistake—I do this work because it's important and needs to be done well. At the same time, our CIO has engaged in such "operational" issues when the necessity arises, for example when he personally managed the solu-

tion of an air-quality problem in one of our buildings.

### **Overlapping Attributes**

EDUCAUSE President Brian Hawkins published a book chapter called "12 Habits of Successful IT Professionals."<sup>2</sup> His list includes habits like reading broadly, understanding the limits of one's advocacy, and maintaining balance. The list is useful for CIOs and executive directors alike; it's also useful for IT professionals filling other leadership roles on their campuses.

The same can be said of Wayne Brown's list of CIO attributes and job description checklist.<sup>3</sup> Surely executive directors must also be "fluent in business language, be able to assess situations that might be confrontational, and have the IT knowledge to use new technology (well) for the institution" (to list just a few of the attributes).

What do we make of the overlap? That the skill sets for CIOs and executive directors can be very similar indeed. If this is the case, how would you go about defining the division of labor in a way that serves your institution, your organization, and yourself? Once again, the answer depends on the culture and particulars of an institution's organization. It ultimately lies in the agreement and ongoing working relationship between the CIO and executive director.

### **Separating Duties**

How does an organization differentiate the lines of work? Clearly, the CIO is the primary leader and will generally get the first call from institutional executives concerning long-term planning or resolution of an immediate problem. Otherwise, the choices of focus can reflect the personal interests of the two partners.

At Carnegie Mellon, our work is often differentiated not by type of task but by subject matter. For example, wearing our ambassadorial hats, the CIO has been the point person on campus as we integrate administrative computing and the central organization responsible for infrastructure and academic computing. I have filled a parallel role as the computer store and enterprise printing

functions transitioned out of the Computing Services Division. Although we do resource planning together, the CIO does campus presentations on budgeting issues, and I have represented the division on space issues and human resource initiatives.

### Focus on the Whole Team

Although the organization clearly benefits if the CIO and executive director work well together, these two leaders in turn must attend carefully to the needs of their senior leadership team. The introduction of a new “number two” position can be disruptive to directors who have served well and enjoyed their relationship with the CIO. If they expect that the introduction of an executive director will provide more opportunities for guidance and mentoring, good. Not so good is if they suspect a new executive director will somehow limit their access to the CIO and generally diminish their independence and sense of being valued.

Between 2001 and 2005, I served as one of two deputy CIOs at the University of Wisconsin–Madison, a campus of approximately 40,000 students and 20,000 faculty and staff. The Division of Information Technology (DoIT) had more than 500 staff. The organizational structure of a CIO with two deputies had been in place several years before my arrival, so the concept of a third leader on the team was not foreign. Members of the senior leadership team were adjusting to the particular person who had just arrived (me) and new divisions of labor.

An open, large-scale search for an executive director can help a CIO find a deputy who will serve the institution, organization, and individuals well. Ideally, the senior leadership team participates and helps choose the new leader. Internal candidates often vie for these positions, which can be awkward for a CIO specifically looking for an external perspective or for someone who complements the CIO’s style. An inclusive and open process helps mitigate some of the tensions that can arise. In any case, a new executive director (just like a new CIO) must expect that



one or more of the current staff saw the executive directorship as a great opportunity lost upon the arrival of an outsider. It is important to acknowledge this structural hiring process directly and positively, ideally using it as an opportunity to garner support.

Consider the following scenario: Carnegie Mellon CIO Joel Smith wanted to hire an executive director for an organization that had used a CIO and executive director leadership team some years previously. The CIO role had grown dramatically—Smith’s work had virtually doubled. The hiring process required multiple conversations between Joel and each director, the new hire (me) and each director, and Joel and me. It was important to define the new reporting lines within a few months and to make it clear that the CIO remained accessible to everyone, even if the reporting lines had changed. We wanted to ensure that each director continued to feel valued.

### One Example: My Experience

As part of the interview process for my current position, I was asked to write responses to the following: What would you expect from the CIO and what (ideally) would you see as differentiation in responsibilities between the CIO and the executive director?

My answer (summarized here) pointed out that this partnership must be based on mutual trust and respect. Success requires the executive director and CIO to talk candidly and hear each other clearly. In addition to working toward organizational and institutional success, each must be committed to the success of the other, and each must be confident of the other’s commitment.

“It will be important to be clear about roles and authority, especially with

respect to organizational (supervisory) relationships and external partnerships,” I continued. “Clarity does not mean rigidity; fluidity and flexibility will serve everyone well.”

I believe the CIO has a critical external role to fulfill, and the executive director has a critical internal role—that of the chief operating officer. These are not exclusive activities, just critical aspects of each role, since each leader must be able to substitute for the other when necessary, which requires good communication. Long-term strategies are thus informed by reality, and daily operations contribute to achieving the big vision.

Finally, this should be fun! Both leaders will work long hours and spend a lot of time together. “Humor, creativity, warmth, the desire and ability to learn from each other... these qualities motivate individuals and ultimately serve organizations and institutions well,” I concluded.

So, yes, each of us leads and each of us manages. And, most of all, we continually stay in sync about our roles and activities. It takes time and repetition to ensure that staff and campus partners understand who’s doing what and whom to call for what.

Nonetheless, we do not anticipate or seek perfect clarity about our roles. To ensure that we both stay current on all issues, we sometimes attend meetings together, which some colleagues might find confusing. Such coverage helps me as executive director step in for the CIO when necessary. It also helps address the “life balance” issues that concern so many aspiring IT leaders. The more a CIO can trust the executive director to step in and manage strategic and operational issues in the CIO’s absence, the more possible it becomes for the CIO to take real vacations. The same is true in reverse, as well.

### Choosing Your Role

So why would you want to be an executive director rather than a CIO? Well, that depends. Choosing to be an executive director may suit your professional needs and your personal style and values very well, either as a final stage in your career or as a step on an upward career path.

One way to think about the executive director's role is to liken it to going to a two-year college. You can choose to end your formal education after two years, or you can continue your schooling. Serving as an executive director can give you a fabulous education. For example, a less experienced candidate might land an executive directorship at a prestigious institution, while the same person might be seen as a viable CIO candidate only at less prestigious institutions. It is also a perfect opportunity to gain a deeper understanding of an IT area other than your original one, such as learning about networking when your background was in administrative computing.

Serving as an executive director is not for everyone. If you really like to fly solo, you should probably think hard before signing on. You might find it helpful to do a systematic review of your preferences and motivations. William F. Hogue of the University of South Carolina and David W. Dodd of

Xavier University recently contributed a valuable chapter to a professional development book<sup>4</sup> that can help you consider important personal questions about what drives you to develop your career and what professional goals motivate you.

The executive director role provides opportunities to learn and to lead. It is well rewarded and recognized. It can be consistent with Teddy Roosevelt's quote, "Far and away the best prize that life offers is the chance to work hard at work worth doing." In a provocative article<sup>5</sup> two years ago, Greg Jackson referred to a popular Beatles' song in "A CIO's Question: Will You Still Need Me When I'm 64?" He decided that yes, we will. "Just as the specifics of my current job are different from those of my predecessor in 1994, my successor in 2014 will have tasks different from mine. But the key elements of my role will remain important to the university..."

And what about for a 64-year-old executive director? What he said. *e*

## Endnotes

1. D. Rath, "A Close Second," *InfoWorld*, January 19, 2001.
2. B. L. Hawkins, "12 Habits of Successful IT Professionals," in *Cultivating Careers: Professional Development for Campus IT*, C. Golden, ed. (Boulder, Colo.: EDUCAUSE, 2006), <<http://www.educause.edu/CultivatingCareers>>.
3. W. Brown, "CIO Effectiveness in Higher Education," *EDUCAUSE Quarterly*, Vol. 29, No 1, 2006, pp. 48–53, <<http://www.educause.edu/LibraryDetailPage/666?ID=EQM0618>>.
4. W. F. Hogue and D. W. Dodd, "Taking Control of Your Career," in *Cultivating Careers: Professional Development for Campus IT*, Cynthia Golden, ed. (Boulder, Colo.: EDUCAUSE, 2006), Chapter 4, <<http://www.educause.edu/CultivatingCareers>>.
5. G. Jackson, "A CIO's Question: Will You Still Need Me When I'm 64?" *Chronicle of Higher Education*, Vol. 50, Issue 21, January 30, 2004, page B22.

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