# Hiring Toolkit: Navigating the Hiring Process

The Bridgespan Group

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*"… Greatness flows first and foremost from having the right people in the key seats..."*
- Jim Collins, *Good to Great and the Social Sectors*

Making great hiring decisions is both challenging and critical. Challenging because getting the hiring decision right is a mix of art and science, requiring significant investment of time and energy. Critical because strong leaders—armed with robust strategies and sufficient capital—can create great results.

Developing and implementing a thoughtful hiring strategy, and having the right tools at your disposal to make the process run smoothly, will help you create the right match between your organization's needs and the people potentially interested in the position. Based on Bridgestar's talent-matching team's collective 65 years of experience in the recruiting field (both for-profit and nonprofit), we have compiled this Hiring Toolkit to help you navigate this process.

Whether you are brand new to the hiring process, significant time has passed since you last hired someone, or you just want to improve your hiring practices—there is information in the Hiring Toolkit for you. The toolkit breaks the hiring process into five major components:

**1. Defining Needs and the Search Process**
How do you begin the process of hiring for your position? This section of the Hiring Toolkit provides questions to help you scope the position and write a well-constructed job description.

**2. Developing the Candidate Pool**
How do you develop an appropriate and diverse panel of candidates? This section discusses how to identify and reach out to networks that will help you develop an appropriately deep candidate pool.

**3. Screening and Interviewing Candidates**
How do you evaluate applicants? This section guides you through the process of screening resumes and interviewing candidates, with tips on topics ranging from managing a rush of applications to planning a successful interview.

**4. Finalizing the Choice**
How do you close your search with a successful candidate? This section walks you through the process of checking references, extending and negotiating an offer, and saying no to those you did not choose.

**5. Managing the Transition**

How do you prepare your new hire for success? This section helps you think through how to integrate your new hire into the organization to ensure a smooth transition.

In addition to detailed commentary on each of these five components, the toolkit includes specific examples of tools our talent-matching team uses with clients (e.g., a search timeline, a candidate assessment tool, a list of interview and reference-check questions, a primer on legal issues, etc.). We hope you will find these tools helpful in making sound recruiting and hiring decisions.

# 1. Defining Needs and the Search Process

## Creating a Recruiting Team

A senior-level position has opened in your organization and it is up to you to get the process started. Or, anticipating a period of growth, your organization is thinking about creating a new senior management role. This initial planning phase of the hiring process is a crucial part of making a great hiring decision. Though several issues—such as assessing fit or managing a new hire's transition into the organization—are part of later steps, talking about these issues early on in the planning process as well will help lay the foundation and create the framework to take you smoothly through the rest of the hiring process.

The first step in this process is to identify a team of individuals in your organization to be part of the hiring process. Why form a hiring team? These team members will be your support system—they can help you scope the position, screen resumes, interview, and manage your new hire's transition. The team is also critical to achieving organizational buy-in for the new hire you select.

Who should be on your team and how and when should they be involved in the search process? This depends on your organization. Your team may consist of anywhere from two to ten members, depending on the size of your organization and the level of the position. You may also wish to include board members or other volunteers on the team, particularly if you do not have a large staff. In general, a CEO/executive director (ED) search will involve board, staff, and possibly search professionals; direct reports to the ED will tend to involve one to three staff and possibly search professionals, but often not the board. Once you have selected the team, clearly outline each team member's responsibilities.

The role of the team is to engage in all elements of the search process; offer a range of perspectives on the position, the candidate profile, and how specific candidates do and do not fit the profile; communicate about the search to the organization; and provide an open forum for discussion and dissent about which candidate to choose. Once you have selected the team, it is helpful to clearly outline each team member's responsibilities (e.g., who will be in charge of managing incoming resumes? How much interviewing will each team member do?) The team also needs to determine a process for finalist selection–whether to have one individual (e.g., the ED) responsible for the final choice, or to have a subset of the hiring team make the decision, or even to require the full team to come to consensus.

Hiring Team's Tasks: Strategic and Tactical

- Identify organizational needs.
- Define the position and identify characteristics of ideal candidate.
- Write job description.
- Network and advertise the opening.
- Gather, organize, and screen resumes.
- Assess candidate resumes according to established criteria.
- Conduct preliminary interviews (often by phone).
- Assess candidates again on the basis of in-person interviews, and advance leading candidates to next steps in the interview process.
- Choose finalists and conduct reference checks.
- Make final choice and extend and negotiate offer.
- Notify participants who were not chosen.
- Thank all who helped in the search.
- Help think through the transition.

When the team is in place, and before you begin to write a job description, think holistically about what your organization needs in order to deliver on your mission and goals. Some questions to ask yourselves include:

- What are our strategic goals and what will it take to get there?
- What are the roles and responsibilities of our current staff? What are their strengths and development opportunities? How are they aligned to help us achieve our goals?
- Having outlined the strategic goals and how existing staff contributes to meeting those goals, what role and responsibility gaps begin to emerge?
- What are the expectations for this new position? What are the roles and responsibilities? How will this role fit within the existing team structure? What experience and/or specific qualifications will the new position require?

- What is the general compensation range for this position in the marketplace and for the level of the position in our organization? What other compensation components (e.g., health/dental/vision, vacation, retirement program, etc.) are we able to offer?

The answers to these questions should start to provide you and your team with a sketch of what the new position will look like. This is a good point in the process to conduct a reality check. Based on the analysis completed thus far, is the organization structured in a way that will allow you to achieve your strategic goals? Will making this next hire allow you to fill your gaps? Can the requirements that the team has sketched out realistically be found in one person? Or does the organization require re-structuring? If you have determined that your organization is well- structured but requires the additional hire to complete the team, you can begin to write the job description. If not, gaining clarity on the ideal structure and how to get there is important to figure out before moving forward.

## Writing the Job Description

A clear and comprehensive job description is key to attracting candidates who fit well with the role you're working to fill. Before embarking on this process, you will need to have developed a clear sense of the role, responsibilities, and qualifications for the position you wish to fill (see Designing and Filling New Positions on Bridgespan.org). Once your team has clarified these dimensions, you can begin to craft the job description. Here we offer a few tips for doing so.

**Begin the job description with an overview of your organization.** The overview includes information such as the mission, size (both budget and staff), location, and structure of the organization. This content will help candidates assess whether your organization is a good fit.

**Highlight the position's reporting relationship(s) and key responsibilities.** This section is the heart of the job description. A candidate will use this information to compare his/her qualifications with the opportunity and the specific job requirements. In our experience, having three key areas of responsibility is best; having more than that may mean the position is too broadly defined.

**Create a realistic set of qualifications.** Ask yourself what specific skills, educational background, experience, and other attributes are the "must haves" for a successful candidate and which ones are the "nice to haves." Setting realistic expectations will help you attract the most appropriate candidates. You also will avoid scaring off highly qualified individuals who may lack one specific attribute listed as a requirement when in reality it was a "nice to have."

**Decide on a salary and benefits range.** Identify a salary and benefits target, but give yourself enough range to attract an extraordinary candidate. To determine an appropriate target range, consider asking peers at similar organizations what they're currently paying, studying compensation surveys such as the Nonprofit Times salary survey, and/or using websites like GuideStar or Bridgestar.org's list of compensation resources. Discuss whether or not to publicize the salary range, and if so, at what stage of the process to do so. An advantage to publicizing the salary range is that you'll avoid talking to applicants who are beyond the compensation your organization is willing to pay. The downside, especially if there is some flexibility, is that you might miss out on a great candidate who may be just beyond the range you've publicized. Occasionally, job posting websites require compensation ranges, and some have pre-set ranges which can require you to choose a range that extends beyond the parameters your organization has set.

**Decide on a title that will make sense both internally (in the context of other job titles) and externally.** Avoid odd titles that only make sense internally. Test potential titles with people who are unfamiliar with your organization; the more quickly they can ascertain what the job is, the better.

**Use the final job description to create job announcements for networking and candidate-development emails.** These communications are condensed versions of the full job description. They should include such details as your organization's name, its mission, and what you ideally seek in a candidate.

The job description is your primary vehicle for announcing the open position to external and internal audiences, and is a valuable tool for finding candidates best-suited to your organization's needs. Investing the time and effort in writing a strong job description will enable your organization to accurately articulate the opportunity to potential candidates.

**See Appendix for Tools:** Sample Job Description
Sample Organization Overview
Sample Email Job Announcement

## 2. Developing the Candidate Pool

When an organization initiates a search to fill a senior management position, a key step in the process is to develop a strong list of potential candidates. A very important role for search committee members is to tap into their respective networks to build a candidate pool. You might think of the outreach process as a "network development campaign." The search committee should ask questions such as, "How can we target the right kinds of people, including both those who might be candidates and those who might be good sources of candidates? How can we ensure that we are reaching candidates beyond 'the usual suspects?' Who do we know who knows those kinds of people?"

On a very concrete level, effective search committees literally put together a chart with committee members' names, individuals to be contacted by each of them, and a "referred" column in which ideas shared can be noted along with any general comments. This chart is a living document that grows and expands during the search and will also be a powerful tool for future searches (imagine those individuals you would like to put forward for a different opportunity, even if they weren't ideal for this one) or simply for building the organization's connections within the community.

But it is important to go beyond personal networks to ensure that your reach to potential candidates is broad enough. In addition to using personal networks of staff and board to find both candidates and sources of candidates, organizations can utilize selected media such as newspapers and online job posting sites. The key is to seek out the most appropriate channels for the specific networks you are trying to tap into—for example, the Financial Executives Networking Group or other finance-related networks if you are looking for a CFO.

Online job sites are growing in popularity. Although a Bridgespan Group survey of approximately 75 nonprofit employers found that, at any given time, roughly 90% of open positions are not posted on online job boards, organizations that do use online job boards find that the boards help them cast a broader net for their searches and are particularly helpful in reaching out to candidates in key functional areas or in different geographies.

The process of developing the candidate pool is especially critical if building a diverse team is a priority. One key mistake organizations make is moving to the interview stage before getting a significant level of diversity in the initial pool. Getting a diverse slate of candidates requires extra effort because the networks of any given individual or organization tend to resemble that person or organization and therefore to be fairly homogenous. Moving beyond the typical networks means, among other things, not relying solely on generic job sites and databases, but rather finding channels into target communities, like local newspapers that circulate in specific neighborhoods, associations like The League (of Black Ivy Alumni) or the National Society of Hispanic MBAs, or conferences focused on a specific group or an issue relevant to the groups you are seeking to reach.

The candidate development phase is one in which organizations often find professional search firms to be of tremendous help, given their strongly established networks of both sources and candidates. However, a persistent and disciplined approach will help an organization do this well internally as well. For example, search team members might send emails to their own contact lists and personally reach out to potential sources of candidates. To make these outreach emails and conversations most effective, team members must be in clear agreement on the top three to five characteristics of the ideal candidate (as defined earlier in the process). Consistently evaluating candidates against the same three to five characteristics will enable the team to focus on the most qualified candidates.

## 3. Screening and Interviewing Candidates

While writing a good job description and leveraging both personal and other external networks to develop a deep candidate pool are critical first steps in finding great leaders and managers, interviewing promising candidates is the first opportunity for both the organization and the candidate to get to know one another. Therefore, it is imperative to prepare thoroughly for the process. In this portion of the hiring toolkit, we aim to provide you with helpful tips as you move from processing applications and screening resumes to conducting high quality interviews.

### Processing Applications and Screening Resumes

You and your team have been thoughtful in defining the position and creating the job description. You have proactively developed an outreach strategy and the description is now circulating widely. How do you prepare yourselves to receive an inflow of resumes? How do you screen the resumes you receive in order to select the right candidates to interview? This step of the hiring process is one of the most difficult. Each applicant has a different set of experiences and skills; deciding which ones best match the responsibilities and requirements of the position is challenging. Many hiring organizations fear that a gem may be overlooked in the process. Creating a system for reviewing resumes will help you improve your chances of including the most relevant candidates in your interview pool, including uncovering those hidden gems. There are several steps you can take to systematically screen resumes so that you select the best candidates for interviews.

**Step 1: Agree on your resume review process and team member involvement.**

- Who will be conducting the resume review? Depending on your organization, the position available, and the availability of team members, you may choose to do this solo, to involve only a portion of your team, or to include the whole team. We recommend you have more than one person screen resumes in order to provide a balanced viewpoint, and that at least one person read every resume so that he or she can provide a consistent perspective on the candidate pool overall.

- The point person in this process will be responsible for collecting and organizing resumes. If resumes are going to be e-mailed to the point person, he or she may want to set up a special email address just for this position (e.g., cfo@sampleorganization.org). This allows you to create an automatic reply, which is a timesaver as well as a prompt way to alert candidates that you received their resumes and to give them a sense of the process going forward.
- Set a preliminary date for reviewers to meet in person for the first resume screen. (This resume screening meeting typically takes a few hours). When you hold this session will depend on your hiring cycle, whether your needs are immediate or more long-term, and how many resumes you receive.

**Step 2: Organize cover letters and resumes in order to speed the reviewing process.**

- As resumes come in, reply to each candidate (one option is to use an automatic reply for this purpose, because it facilitates prompt acknowledgement, although it is less personal than an individual reply). Let the candidate know you have received his or her resume, will consider it, and will get in touch when decisions are made. Responding is critical (and a basic courtesy); candidates often feel uneasy about being left in the dark.
- Create a process by which to review all resumes. As resumes come in, organize them alphabetically and assign each a number code. A numbering system ensures that the resume reviewing team receives all of the resumes in the same order, and will speed up the communication process.

**Step 3: Review resumes thoughtfully and objectively.**

- Whether you receive three quality resumes or 50, reviewing each resume thoughtfully and objectively is critical to success.
- Create an assessment grid on which you can assess candidate resumes. An assessment grid, illustrated later in this section, is a tool that outlines the core criteria from the job description and allows you to compare candidates across those criteria. Grids should include categories such as accomplishments, job experience, education, technical skills/licenses, and relevant volunteer experience.
- Once all resumes are received, distribute the resume packets to the resume review team well in advance of your first meeting. Clearly outline the timeframe to review the resumes. Have each member of the team review the resumes individually and place resumes in one of three piles—"yes," "no," or "maybe"—based on the criteria in the assessment grid. Ask team members to

keep in mind the top three to five previously identified characteristics of ideal candidates as they review resumes.

- Provide your team with the following key questions to keep in mind when reviewing resumes:
    - How do the candidate's professional experiences and educational background map to the prioritized requirements in the job description?
    - Do you have a sense of the environment in which this person has worked? How similar or dissimilar is this to our organization?
    - How many accomplishments resonate at our organization? (You might suggest that reviewers highlight them as they read the resumes.)
    - Does the candidate's cover letter put his/her experience in a context that allows you to see how close a match it is to our organization?
    - What is the candidate's work history?
    - Has the candidate's career progress been quick, steady, or slow? Which of these three options gives you the most confidence there might be a fit?
    - Has the candidate held a number of jobs in different areas that appear to be side steps versus real career jumps?
    - Does the candidate have any red flags in his/her background, such as an unexplained gap in work chronology, or more than one position where he/she has stayed less than two years? (While these issues may not be crucial to the decision to interview or not interview, they may be worth probing further.)
    - What do the candidate's work choices say about his/her willingness to take risks? How does this fit (or not) with our organization?
    - Do you get a sense of the person behind the resume?
    - If this person has never worked in the sector before, do you see personal and/or volunteer activities that show the type of mission commitment we're seeking?
- In the first resume review meeting, begin by comparing the resumes in the "yes" pile. Have the reviewers focused on the same resumes? If not, what discrepancies do you see? At this time, also decide which resumes everyone agrees are not right for the position and set those aside. Work through the pros and cons of each resume that the team agrees falls into the "yes" or "maybe" piles.
- A good goal is to get 8-12 candidates to phone screen and/or interview (depending, of course, on how many applicants there are overall).

**Step 4: Make the interview decision**

- Begin with analysis and comparison of resumes in the "yes" group. What are the strengths/development needs of each of these candidates? What are the key tradeoffs you must make in picking a candidate?
- Talk through the "maybe" group in detail, and try to move candidates into either the "yes" or the "no" piles.
- Discuss what you would probe with each candidate you decide to interview. What are the key questions you will use to do this?
- Agree on which resumes are in the definite "no" group and let the applicants know.

At this point in time, a simple note or phone call to the ultimate "yes" and "no" groups will help move the process along and keep candidates informed as to where they stand in the process.

**See Appendix for Tools:** Sample Assessment Grid

## Conducting Successful Interviews

The interview is the first opportunity for the organization and the candidate to get to know one another, so it is imperative to prepare well. You should start preparing during the resume screening process by compiling a list of questions and/or issues you would like to probe with each interviewee.

In addition, some things you can do before the interview include:

- **Decide what type of interview process** is right for this job and with whom each candidate should interview. Depending on the level of the position, you may determine that a multi-step process is appropriate. For example, round one might be a telephone interview, round two an in-person interview, and round three a presentation made by the candidate to multiple members of the hiring team.
- **Inform candidates well in advance** about the interview process and times, type of interviews to be conducted, location and length of interviews, and with whom they will be interviewing.
- **Begin in a manner that provides a comfortable atmosphere for the candidate.** Depending on each candidate's knowledge of the company, the interviewer can provide a short history of the organization and his/her role in the organization before the questions begin.
- **Ask open-ended questions.** In order to draw out the most significant information from a candidate, create questions that are "open-ended," allowing the candidate to express ideas and explain his or her experience and work style. For example, ask, "What is important to you in a

workplace?" instead of, "Do you like structure in a workplace?" Or ask, "Tell me about a time you led a cross-functional team" instead of, "Have you ever led a cross-functional team?"

- **Interview for results.** When compiling the list of questions, focus on what results the candidate may have achieved. For example, if you are hiring a new COO for your organization and managing budgets is a key role for this position, instead of asking, "Have you managed budgets before?" ask, "What outcomes did you achieve when managing the budget in your previous job?"
- **Probe for ability to manage and work in teams.** For example, you might ask "Tell me about an example of your work with international teams. How did you manage a group of people you worked with so remotely?"
- **Assess each candidate for fit with your organization's culture.** Assessing for fit with your culture can be challenging; however, when hiring for senior management positions, fit is incredibly important. Understandably, an organization's culture is not easy to define. There are some questions, however, that you can ask yourself after interviewing someone to help you assess a candidate's fit, such as "Does the candidate share the same values as our organization? Can I imagine the candidate working effectively with our team? Would I be able to work with this person?" Avoid going overboard on the perfect fit, as balancing cultural fit with the goal of building a team with a diverse set of backgrounds, experiences, ideas, and working styles is critical.
- **Steer clear of personal, private, and discriminatory questions.** The following areas are among those legally off-limits in interviews: age, citizenship (although you can ask if an employee is authorized to work in the U.S.), race/ethnicity, disability, gender, health issues, marital status, national origin, personal finances, family information, and religion. The Equal Employment Opportunity Commission (EEOC) has a complete list of things to avoid, summarized later in this toolkit. Make sure to avoid these areas even in informal conversation with candidates. If a candidate voluntarily discloses information in any of these areas, do not pursue the topic.
- **Create consistency across candidate interviews.** It is important for each candidate to be interviewed by the same individuals within your organization. At the same time, remember that each candidate has a set of unique experiences, strengths, and weaknesses—allow for opportunities to probe more deeply in different areas for each candidate.
- **Listen to how a candidate answers your questions.** While asking the right question is important, listening to what is and is not said is even more critical to assessing the candidate's fit with the position. Have an idea ahead of time of what a "good answer" is to your question, but be flexible and open to answers you have not thought of. Once you have listened to a candidate's answers, if there are comments that raise questions, make sure to probe further.

- **Probe specifically for candidates moving into the nonprofit sector for the first time**, or making significant intra-sector transitions. Many individuals with significant experience in the government or for-profit sector are interested in “bridging” to the nonprofit world in order to connect their skills and experiences to a mission about which they feel passionate. Ask questions that give these candidates an opportunity to explain how their skills and passions translate from one role or sector to another.
- **Invite the candidate to ask questions.** Remember that this is a two-way process, and candidates may have questions about the role and the organization to help them assess fit. Pay attention to the quality of questions, as it may be informative about the candidate.
- **Discuss compensation at the appropriate time.** It’s important to establish realistic expectations regarding compensation at the outset of an interview process. You want to ensure that, should a candidate become a finalist, your organization can make an attractive offer. You may want to ask candidates who have advanced through a phone screen for a general sense of their expectations around compensation for the position and/or any deal-breakers related to compensation. This is to ensure, early in the process, that the candidate and the organization are aligned in their thinking on compensation ranges for the position.
- **Let candidates know what to expect** in terms of timeframe and next steps in the process.
- **After interviews, update assessment grids for all active candidates.**

**When Internal Candidates are Part of the Process**

Many searches include a mix of internal and external candidates. Though the same principles apply to both types of candidates, there are several best practices that apply specifically to a process that includes internal candidates.

Recruiting from the outside can be riskier than promoting from within, and giving emerging leaders the opportunity to advance internally is important, so if appropriate your process should encourage internal candidates and give them a fair shake. However, because of the potential internal impact of *not* choosing an internal candidate, you need to be very careful in setting expectations and must be crystal clear about the role and criteria from the beginning.

For internal candidates, it is nice to say up front that you are excited that they have applied, and that the organization does not want to lose them, regardless of the outcome of the search. It can be very helpful to explain why the organization is searching for external candidates at all, and to be very clear in articulating the process, timing, and specific criteria. Always avoid implicit or explicit promises about the outcomes of the process.

On the flip side, employers sometimes do less due diligence on internal candidates than external ones, assuming that they know enough already about a person who has worked for them for years. However, it is important not to skip steps in the process. Do set up interviews, and do conduct both internal and external reference checks as well (if reasonable to do so). The checks you conducted when hiring the employee initially likely focused on a different set of roles and responsibilities than those encompassed by the new role, although remember that the person has likely grown and developed since the time they left their previous employer, so take the external references in context.

**A Note on Confidentiality**

A key area of concern for both hiring organizations and candidates is confidentiality, which can become an issue when a candidate or potential recruiting target works for another organization in the field and/or doesn't want the current employer to know that he or she is considering a change, or when the hiring organization itself is not ready to let the public know that they are conducting a search. There are a number of ways to protect a candidate's identity. For example, you might designate a single contact person for that candidate, and use "Candidate X" in all verbal and written descriptions of this person even with the search committee. You can password-protect key documents, such as resumes and other hiring-related documents. If others (e.g., sources you have called) mention an existing candidate as a referral, you should say "thank you for the referral" without indicating that you have already been in touch, and be careful about probing for any more detail on one referral vs. the others. Finally, always ask the candidates for the best way to reach them (e.g., phone or email, cell vs. landline) and whether voicemail and email are confidential.

While you do want to let candidates know things such as expected timing of a decision and where they are in the process, in most cases you should not share names of other candidates. For some organizations, this is extremely important and impacts the hiring process and logistics as well. For example, when bringing in candidates for a day of interviews with key hiring team members, you may need to be careful to avoid having candidates bump into one another in hallways or reception areas, which you can do by staggering start and end times of interviews, or having each candidate stay in one room while the interviewers rotate rooms over the course of the day.

In addition, as part of the interview process for senior-level roles, you may share some organizational information that you would like candidates to keep confidential. While typically letting them know that this information is not to be shared is sufficient, in some cases (e.g., when interviewing someone from a competitor), having candidates sign a non-disclosure agreement before you share confidential internal information is a sound approach.

**Primer on Legal and Illegal Interview Questions**

The following guidelines, called the Fair Inquiry Guidelines, were established by the Equal Employment Opportunity Commission (EEOC) in order to provide specific protection from discrimination in hiring certain protected classes. This information may be updated by the EEOC from time to time. For more information visit the EEOC website at www.gsa.gov/eeo.

**Subject: Marital Status**

- **Unlawful Inquiries:** Whether the applicant is married, divorced, separated, engaged, widowed, etc. "What is your marital status? What is the name of relative/spouse/children? With whom do you reside? Do you live with your parents? Or, How old are your children?"
- **Lawful Inquiries:** "What are the names of relatives already employed by the company or a competitor?" Other than that specific question, NONE.

**Subject: Residence**

- **Unlawful Inquiries:** Names and relationships of persons with whom applicant resides. Whether applicant owns or rents a home.
- **Lawful Inquiries:** Inquiries about address to the extent needed to facilitate contacting the applicant. (A post office box is a valid address.) "Will you have problems getting to work at 9am?" is also legal.

**Subject: Pregnancy**

- **Unlawful Inquiries:** All questions relating to pregnancy and medical history concerning pregnancy, such as "Do you plan on having more children?"
- **Lawful Inquiries:** Inquiries about duration of stay on a job or anticipated absences which are made to males and females alike.

**Subject: Physical Health**

- **Unlawful Inquiries**: General questions ("Do you have any handicaps?") which would tend to elicit information about handicaps or health conditions which do not relate reasonably to fitness to perform the job. "Have you ever had any serious illness?" or "Do you have any physical disabilities?" or "What is the prognosis of your handicap?"
- **Lawful Inquiries:** "Can you lift 40 lbs?" or "Do you need any special accommodations to perform the job you've applied for?" or "How many days did you miss from work (or school) in the past year?" Such questions must be specific and relate to requirements listed in the job description.

**Subject: Family**

- **Unlawful Inquiries:** Questions concerning a spouse or spouse's employment or salary, child care arrangements, or dependents, such as “How will your husband feel about the amount of time you will be traveling if you get this job?” or “What kind of childcare arrangements have you made?”
- **Lawful Inquiries:** Whether applicant can meet specified work schedules or has activities or commitments that may prevent him or her from meeting attendance requirements. “Can you work overtime?” or “Is there any reason why you can't be on the job at 7:30 am?” are acceptable.

**Subject: Name**

- **Unlawful Inquiries:** Any inquiries about name which would divulge marital status, lineage, ancestry, national origin, or descent. (e.g., “If your name has been legally changed, what was your former name?”)
- **Lawful Inquiries:** Whether an applicant has worked for the company or a competitor under any other name and if so, what name.

**Subject: Photographs**

- **Unlawful Inquiries:** Requests that an applicant submit a photo at any time prior to hiring.
- **Lawful Inquiries:** A photo may be requested after hiring for identification purposes.

**Subject: Age**

- **Unlawful Inquiries:** Questions that seek to identify applicants age 40 or older.
- **Lawful Inquiries:** “Are you at least 18 years of age?” or “If hired, can you furnish proof of age?”

**Subject: Education**

- **Unlawful Inquiries:** Any question asking specifically the national, racial, or religious affiliation of a school.
- **Lawful Inquiries:** All questions related to academic, vocational, or professional education of an applicant, including the names of the schools attended, degrees/diplomas received, dates of graduation, and courses of study.

**Subject: Citizenship**

- **Unlawful Inquiries:** Asking whether an applicant is a citizen, or requiring a birth certificate, naturalization or baptismal certificate. Questions such as “Are you a citizen of the US?” or “Are your parents or spouse citizens of the US?" or "Are you, your parents, or your spouse naturalized or native-born US citizens?"

- **Lawful Inquiries:** Whether applicant is prevented from being lawfully employed in this country because of visa or immigration requirements, and/or whether the applicant can provide proof of citizenship (passport), visa, or alien registration number after hiring. For example, "If you are not a US citizen, do you have the legal right to remain permanently in the US?" or "What is your visa status?  Are you able to provide proof of employment eligibility upon hire?"

**Subject: National Origin/Ancestry**

- **Unlawful Inquiries:** Everything. "What is your nationality?" or "What language is spoken in your home?" or "What is your mother tongue?"
- **Lawful Inquiries:** "What languages do you speak, read, or write fluently?" This is only legal when the inquiry is based on a job requirement.

**Subject: Race or Color**

- **Unlawful Inquiries:** Any question that directly or indirectly relates to race or color.
- **Lawful Inquiries:** None

**Subject: Religion**

- **Unlawful Inquiries:** Any question that directly or indirectly relates to a religion.
- **Lawful Inquiries:** None except "Can you work on Saturdays or Sundays?" and then only if this is a requirement of the job.

**Subject: Organizations**

- **Unlawful Inquiries:** "To what organizations, clubs, societies, and lodges do you belong?"
- **Lawful Inquiries:** "To what professional organizations do you belong?" These inquiries must only relate to the applicant's professional qualifications.

**Subject: Military**

- **Unlawful Inquiries:** Type or condition of military discharge. Applicant's experience in other than US armed forces. Request for discharge papers.
- **Lawful Inquiries:** Inquiries concerning education, training, or work experience in the armed forces of the United States. (Note: in many areas, veterans are a protected class).

**Subject: Height and Weight**

- **Unlawful Inquiries:** Any inquiries not based on actual job requirements.
- **Lawful Inquiries:** Inquiries about the ability to perform a certain job. Being of a certain weight or height will not be considered a job requirement unless the employer can show that no employee with the ineligible height and weight could do the work.

**Subject: Arrests and Convictions**

- **Unlawful Inquiries:** All inquiries relating to arrests. For example, "Have you ever been arrested?"
- **Lawful Inquiries:** None relating to arrests. Legal inquiries about convictions include: "Have you ever been convicted of any crime? If so, when, where and what was the disposition of case?" or "Have you ever been convicted under criminal law within the past five years (excluding minor traffic violations)?" It is permissible to inquire about convictions for acts of dishonesty or breach of trust. These relate to fitness to perform the particular job being applied for, as stipulated by FDIC requirements.

**See Appendix for Tools:** Sample Interview Questions

## 4. Finalizing the Choice

After interviews have been completed, it's time to bring the team together to discuss, debate, and agree on the top one to two candidates. At that point, you can also arrange for subsequent interviews if needed (e.g. if a key member of the hiring team hasn't met the number one choice) and initiate a reference check.

In many cases, the search committee lets out a collective sigh of relief at this point in the process. Though it is tempting to think of the reference check as a mere formality, this step is critical both to making a final decision and, if all goes well, to thinking about how best to manage the individual's transition into the organization.

### The Reference Check: More than a Formality

Most hiring organizations underestimate the amount of information one can obtain from reference checks if you both ask and listen carefully. You're looking not just for things that will rule out a candidate but for things that will help you make trade-offs among candidates, or will help ensure that the person you pick will be positioned to succeed within the organization. Though in some cases you might only conduct a reference check on your clear first choice, in other cases it makes sense to gather references for more than one finalist. Information from the reference check may elevate a finalist to "the" candidate and/or help you think from the start about how to support and develop this person appropriately.

Certainly, the reference check can reveal information that causes you to eliminate someone as a candidate. For example, you may find that the candidate has exaggerated information about employment history or education on his or her resume, or has a history of failing to collaborate effectively with coworkers. Establishing trust with each reference is critical for getting answers that go below the surface. The person giving the reference needs to know that you are interested and invested in making sure this is a good fit for the organization and the individual and are not just looking for “dirt” or a confirmation of what you already know. In order to do so, you need to spend time up front with the reference to introduce yourself and to explain the specific opportunity. Though you’re clearly looking for specific information, you may find that references are more forthcoming when the process feels like a conversation.

Taking insightful references on prospective employees is essential, but how do you get started? You can either have a third party take references for your candidate or you can conduct the references internally. Either way, it is helpful to do a number of references–ideally five to six for senior-level candidates–to gather both:

- **Hard data** – confirmation of the candidate’s track record, skills, and competencies, including information about the role the candidate played within the organization, specific responsibilities, and performance; and
- **Qualitative data** – tangible examples that allow you to better understand the candidate’s management and communication style, track record, and both strengths and areas for improvement, including more qualitative questions about the individual’s style, interpersonal interactions, and approach to work.

Your goal in conducting references is to speak with individuals who have known and worked with the candidate, ideally for a long period of time and in different settings. When asking for a reference list, you should suggest that candidates provide references that include peers, direct reports, their own bosses, and/or individuals external to their organizations with whom they worked fairly closely (e.g., a vendor, a client, or a partner in a collaboration). Speaking with this broad list of people should provide a rounded view of how a candidate interacts with people at different levels within and outside the organization.

Again, if at all possible, avoid questions that elicit a “yes” or “no” response; rather, focus on questions that are open-ended and allow the reference to describe events, accomplishments, and difficulties. Ask for examples and explanations. Listening carefully and drilling down below the surface of initial comments will make a reference truly useful. For example, if someone notes that a candidate was a great manager but didn't get along well with the CEO, you might ask, "Is that unusual in the organization?"

It is important to listen not just to the overall comments a reference makes, but also to the specific word choices and the tone and enthusiasm with which the reference describes the candidate. If he or she makes a comment that seems unclear, ask a follow-up question. Keep your antennae up for shifts in tone, long pauses, or hesitations that might indicate that you've hit a sensitive or troublesome subject. Acknowledge the shift, be willing to follow up, and, most importantly, probe the source. Also keep an ear out for overly enthusiastic references without sufficient depth of examples to back up the praise.

Reference checking has its own set of confidentiality and legal issues. You must always get permission from the candidate before taking references. You should ask them to sign a release giving you permission to check both named and un-named references as well as to conduct credit and background checks, and can not legally start that process until they do. (Note: credit and background checks are standard in some industries, and several companies provide this service for a reasonable fee). In addition, your personal notes from a referencing conversation are not to be shared. Instead, write up a summary of each reference check to share with the full search committee. To protect the reference-giver, do not attribute sources of specific quotes or comments, and destroy hand-written notes once the referencing report is written. Note that candidates can request a copy of the reference report and any stored information in their files. And of course, EEOC guidelines on discriminatory questions for interviews apply to reference checks as well.

Many organizations turn to professional third parties for reference checks. Why? Professional recruiters are able to gather information objectively that allows the organization to benchmark the candidate's skills and personal qualities against the job description. In addition, while candidates generally do not offer references who would not give glowing testimonials, professional recruiters have extensive personal and professional networks that often allow the organization to benefit from references that have not been named by the candidate. Furthermore, as professional recruiters tend to do reference checks much more frequently than any given nonprofit leader, their expertise and comfort in making reference calls may help get the most out of each one.

Again, it is critical that anyone conducting a reference avoid discriminatory questions and use and report on the information gathered in a legally acceptable manner. The Association of Executive Search Consultants (http://www.aesc.org) is an excellent source for more information on the ethical standards surrounding gathering references.

Given how important it is for your organization to make a good hiring decision, you may also want to look beyond gathering references and utilize other methods of screening candidates' backgrounds, including verification of:

- **Employment history** – dates, positions and actual responsibilities can be checked with the specific employers listed.
- **Educational degree** – you can call registrars at colleges and universities to check on diplomas, and you can verify some certifications (e.g., Certified Public Accountants) online.
- **Criminal and civil records** – there are both specialized investigative firms and web-based services that can help you conduct criminal and credit checks on a candidate. In all cases, candidates must be made aware ahead of time that their backgrounds are being checked and must acknowledge their consent in writing.

**See Appendix for Tools:** Sample Reference Questions

## Extending an Offer

The combination of multiple interviews and reference checks should give you enough information to make a hiring decision. Though you will likely want to call the candidate by phone to extend an offer live, you also need to put the offer, with full details, in writing and if he or she accepts it, have the candidate sign and return a copy for your files. The offer letter should include information about salary and benefits as well as other applicable components of the compensation package, such as review cycles, coverage of relocation costs, or severance package guarantee. In addition, you should include details about who the person will report to and how job performance will be evaluated.

Extending an offer with enthusiasm is important in setting the tone for your relationship with your top candidate and soon-to-be new hire. You need to let the final candidate know that you want him or her to be part of the team, and that you are excited to be making an offer. The compensation component of the offer needs to reflect any previous conversations you've had on that topic. Offering a candidate a compensation package that is lower than what was previously discussed during the interview process will likely leave the finalist disappointed. Being clear early in the process regarding compensation ranges will help to avoid surprises at this point in the hiring process, will allow you to make your best offer to the candidate, and will help focus your finalist on the responsibilities of the job and the overall opportunity.

**See Appendix for Tools:** Sample Offer Letter Template

## Saying "No"

The best part about the hiring process is extending an offer to a terrific candidate and taking him or her out to a celebratory lunch when the offer is accepted. But what about contacting the candidates that you did not choose? Most people are conflict averse and find it hard to say "no." But doing this right can make the difference between burning a bridge and maintaining a relationship.

The most important thing you can do to make saying "no" easier starts early in the search process. Throughout the interview process, you should be getting a sense of candidates' expectations, concerns, and potential deal-breakers in terms of the role, reporting relationships, compensation level, etc. Likewise, you can (and should) also be open about concerns you have about candidates throughout the process, especially experience gaps or other issues that might put them out of the running. This way, candidates won't be taken by surprise if and when they are turned down for the job.

But say you've been open throughout the process, you've decided on your final choice, and the time comes to turn down the other candidates. Here are some practical tips on saying "no" well.

- Be timely. Once you're sure you have eliminated a candidate from consideration, it's a big mistake to avoid letting him or her know, as being kept waiting compounds the disappointment of being turned down. This is true both for candidates who are eliminated early in the process and for those who make it to the final rounds.
- The person who has been managing the process should be the one to make the call, whether that is the executive search firm, an HR manager, or the hiring manager. In the early rounds it is common practice to simply leave a short voicemail if you don't reach someone, or even send an email, but short-list candidates should get a voice-to-voice conversation.
- Be clear and succinct in your explanation. This is of course much easier if the reason you didn't choose the candidate has to do with a skill or experience gap, rather than a personality or "fit" issue. In general, it is helpful to put the turndown in the context of the person who did receive the offer, for example, "Though we were impressed by your commitment to the organization and strong management background, the final candidate had significantly more experience in running multi-site organizations, and that was really important to us." (Of course this approach is only possible with final round candidates, as the rest will likely need to be notified before you have made the hire.)
- Do not turn down your second-choice candidate until your first choice accepts the job, unless you are certain that you wouldn't extend him or her an offer if your first choice fell through. First-choice candidates sometimes turn down offers, and when a high-potential second-choice

candidate responds enthusiastically to an offer, the contrast in reactions can show that the second choice was in fact a better fit.

- Share the final result with all candidates (from all stages of the process) as well as those involved in the search, and emphasize why the new employee is a great fit. After finalizing a hire, search firms typically email everyone involved in the search and personally call those on the short list, and employers managing their own searches can do the same.

## 5. Managing the Transition

The important work of making a successful hire is not complete when the candidate accepts the offer. Rather, the process continues through the new hire's first 30 to 90 days as he or she manages the transition into the new role. This section describes the process of ensuring a successful transition for your new senior leader. You may also want to review Michael Watkins's *Taking Charge in Your New Leadership Role, A Workbook*—a comprehensive and useful guide to aid you and your new leader in this process.

There are many things both you and your new hire can do before his or her first day to make the transition run as smoothly as possible:

- **Encourage the new hire to continue to learn as much about the organization as possible before the transition**, both through conversations with you and others, and by keeping up with relevant news and sector-related articles. Encourage him/her to join relevant professional associations and, if possible, to attend any public events that your organization is sponsoring before the official start date. Spend time discussing the organization's current strategy and the associated goals and challenges. Ask the new hire to form hypotheses about the organization's operating priorities, to be tested during the first six months or so in order to validate them and/or make changes as needed. But do not push him/her to develop "the answer" too soon. It's likely that there are no quick-fix solutions, and first listening and then acting will yield greater success rates and inspire greater confidence among colleagues who are anticipating the arrival of a new senior leader and who may have attempted to address these issues in the past.
- **Make sure to introduce the new hire to the right people before arrival and on the first day.** Formally introducing the new senior manager to the organization (and the board as well) before he/she begins is imperative. Employees need to know what to expect, and the new leader will benefit from getting a sense of his/her new team's responsibilities, style, concerns, etc. to help prepare for the first few weeks. Prior to the first day, make an announcement about the new hire, his/her background, and his/her start date to the full organization. Create a detailed agenda for the first day and a general agenda for the first two weeks.

- **If possible, name a mentor or "ombudsman."** An ombudsman is someone to whom the new hire can go to for objective advice and questions (and thus ideally should not have a reporting relationship with the new hire). This person should understand the institutional history, the leadership team, and the organization's strengths and weaknesses.
- **Provide clear expectations.** The hiring manager should provide clear expectations to the new hire in his/her new senior-level role. This should include sharing information on communication styles and ideal communication frequency. For example, you might describe that in your organization weekly written updates of action items and status on key projects tend to be better received than monthly voicemails. It is typically useful for new leaders to err on the side of more communication rather than less, especially in the first few months.
- **Provide clear information regarding the team to be inherited.** Describe the team's major strengths and weaknesses (i.e., those highlighted on recent performance reviews or development goals) and what major issues need to be addressed. If an internal candidate was considered but not chosen for this role, the new hire needs to know this so he or she can be sensitive to any concerns or disappointment. It is also important that a new senior-level (but non-ED) hire be seen as the "go to" person for his or her team, even if in the early days the plans are being jointly crafted by the ED and the new hire.
- **Work together to develop three-, six-, and 12-month priorities.** Here you will be building on discussions you had during the interview process. Priorities should encompass learning opportunities and clear, measurable deliverables, and should enable the new leader to develop trust and credibility within the organization. Early wins are crucial, as is beginning to lay a foundation for sustained improvement in organizational performance. But remind him/her to prioritize early on, and not to attempt too much right off the bat.

* * *

Hiring decisions are challenging, and engaging in a thorough process requires time and energy. In addition, inherent in every hiring decision is an element of risk and a required leap of faith. No matter how well you know your final candidate, it's impossible to be 100% certain how he or she will perform in the new role. Executing a disciplined, rigorous search process like the one outlined in this hiring toolkit will help to mitigate the risks and allow you to make that leap of faith with confidence.

## Appendix

**Samples, Templates, and Tools**

1. Sample Recruiting Timeline
2. Sample Job Description
3. Sample Organization Overview
4. Sample Email Job Announcement
5. Sample Assessment Grid
6. Sample Interview Questions
7. Sample Reference Questions
8. Offer Letter Template

## Sample Recruiting Timeline

| **Week** | **1** | **2** | **3** | **4** | **5** | **6** | **7** | **8** | **9** | **10** | **11** | **12** | **13** | **14** | **15** | **16** | **17** |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Assemble hiring team and develop plan | X | X | | | | | | | | | | | | | | | |
| Create job description | X | X | | | | | | | | | | | | | | | |
| Conduct outreach and develop candidate pool | | | X | X | X | X | X | X | X | X | X | X | X | | | | |
| Develop assessment tools | | | X | X | | | | | | | | | | | | | |
| Prioritize resumes | | | | | X | X | X | X | X | X | X | X | X | X | | | |
| Conduct phone screens | | | | | | | X | X | X | X | X | X | X | X | | | |
| Hold review meeting - choose candidates to move forward | | | | | | | | X | | | | | | | | | |
| Conduct in-person interviews | | | | | | | | | | X | | X | | X | | | |
| Check references | | | | | | | | | | | X | X | X | X | X | | |
| Make decision; extend/negotiate offer | | | | | | | | | | | | | | | X | X | |
| Close down search process | | | | | | | | | | | | | | | | | X |
| Manage transition | | | | | | | | | | | | | | | | X | X |

## Sample Job Description

**VP of Finance Example**

**Organization Description**

Sample Organization is a $5M national nonprofit organization that engages people in service to work toward youth civic engagement. To this end, we recruit and train volunteers, working directly with youth to build skills crucial to civic engagement. Since our founding in 2000, Sample Organization has grown from two sites to 50 sites throughout the country, with headquarters in XXX, and a staff of 100.

**Position Summary**

The VP of Finance will report directly to the CEO & president and will play a key role in setting the financial policy and direction of the organization. In this capacity, the VP of Finance will be a member of the senior management team and will work closely with the executive director, other VPs, and the board finance committee. The VP of Finance will also fully support all discussions with the board of directors on financial matters of the organization.

**Responsibilities**

**Strategic Planning**

- Participate in ongoing strategic planning process with senior management team.
- Oversee long-term budgetary planning and cost-containment in alignment with strategic plan.
- Assess any changes necessary to the annual audit process and internal financial management systems.
- Address all financial reporting issues related to GAAP.
- Help coordinate national board of directors finance committee.

**Financial Reporting**

- Facilitate annual organization budget process. Manage cash flow forecasting.
- Oversee implementation of budgets, and monitor progress and changes.
- Take responsibility for customization of internal financial statements as needed by management, within limits of accounting software.
- Review any written financial agreements before organization commitment.
- Ensure all necessary annual filings are completed – Form 990, Form PC, MA UFR, etc.
- Secure and manage annual financial and A-133 audits. Oversee organizational compliance with regulations as per contracts and A-133 regulations.
- Oversee all grants and contracts with governmental agencies and private restricted donations/grants.

- Monitor utilization and facilitate release of governmental and restricted funding.
- Oversee and coordinate all submissions to and communications with federal and state agencies, including budgets and budget amendments.
- Review and approve all externally distributed financial information (such as proposals, applications, requests for funding, etc.) before any information is dispersed.
- Oversee use of acceptable cost allocation plan and indirect cost rate.

**Position Requirements**

- CPA and/or advanced degree in business, public administration, or related field required.
- Eight to ten years experience in financial management, accounting, and administrative operations.
- Experience developing budgets, managing private and government grants.
- Ability to work with all departments, a diverse team, and board finance committee.
- Ability to manage projects, partnerships, and professional relationships.
- Hands-on manager with impeccable integrity. Strong sense of ownership in department function.
- Experience developing and managing accounting staff and developing service-minded culture.
- Ability to plan, organize and think strategically.
- Highly organized and flexible in dynamic environment.
- Strong written and verbal communication and presentation skills.
- Commitment to Sample Organization's mission and values.

**Salary and Benefits**

Salary commensurate with experience. Excellent benefits. We are an equal opportunity employer.

To apply for this position, please submit a cover letter and resume to: careers@sampleorganization.org by June 15, 2007.

## Sample Organization Overview

The organization overview in a nonprofit job description shares key descriptors of the organization. It should include information that will help interested external candidates better assess their fit with the organization and better understand the organization's goals and beneficiaries. A detailed overview can include information about a nonprofit's:

- History
- Mission
- Beneficiaries
- Goals
- Programs
- Outcomes/Achievements
- Budget
- Funders

Below is a sample organization description provided by the Bridgespan Executive Search team that exhibits many descriptors helpful to qualified candidates considering a position with a nonprofit organization.

**The Organization**

Higher Achievement is a four-year high school preparatory after-school program for disadvantaged urban children of various academic levels during middle school, 5th-8th grade. Higher Achievement's mission is to develop academic skills, behaviors, and attitudes in academically motivated and underserved middle school children to improve their grades, standardized test scores, attendance, and opportunities to attend top high school programs. Higher Achievement offers three year-round, community-based programs: After-School Academy; Summer Academy; and Top High School Placement. Higher Achievement students mark some of the highest gains in the country with 70 percent of all "C" (or below) students having increased a full letter grade or more in reading, 68 percent of all "C" (or below) students having increased a full letter grade or more in math, 54 percent of students having improved their standardized reading score with an average increase of 9.5 percent, and 66 percent of students having improved their standardized math score with an average increase of 11 percent during the 2003-2004 program year.

Founded in 1975 and re-organized in 1999, Higher Achievement serves approximately 500 students or "scholars" in the Washington, D.C. metro area at five sites. Its budget is $1.7 million and there is a current staff of 20. With the assistance of 300 volunteer mentors, Higher Achievement scholars spend 650 hours per year in after-school and summer instruction. In 2006, Higher Achievement plans to begin a process of regional scaling with a long-term goal of a national scaling initiative. Higher Achievement is currently engaged in a highly-regarded randomized study run by Public/Private Ventures to measure the tangible outcomes of its efforts.

In 2005, Higher Achievement received the Neighborhood Builder Award from Bank of America, *The Washington Post*'s Award for Excellence in Nonprofit Management and the 2005 Accenture/NPower Award for Innovation in Technology. The White House has twice recognized Higher Achievement for its contributions.

Please visit www.higherachievement.org for more information.

## Sample Email Job Announcement

A well-written job description is your springboard to creating other types of communications with which to announce your open position. The email job announcement (a sample is provided below) is one type of communication that can be used to reach out to your network of peers for qualified candidates. A condensed version of the full job description, this email job announcement includes such details as your organization's name, its mission, the key responsibilities of the role, and what you ideally seek in a candidate.

The below sample announcement was written by the Bridgespan Group's Executive Search team and was sent to its network to help find qualified candidates for a past role it was retained to fill. It provides a general outline for the type of information to include in an email announcement to peers, colleagues, and other trusted sources you might tap during your candidate search.

**Subject: Seeking Executive Director of Investments**

Dear **Name**,

The Children's Investment Fund (CIFF) currently has an opening for an Executive Director of Investments, and I'd appreciate your input on candidates or sources for this key role. Below I've provided details about our organization and the position we wish to fill.

CIFF is a London-based foundation that seeks to address the problems of children living in poverty in developing nations. With an asset base of more than $1.7 billion, CIFF currently employs approximately 30 professionals in England, Africa, and India. CIFF is funded through a hedge fund and strives to couple business acumen and principles with development experience and best practices to transform the landscape for children.

The EDI will be part of CIFF's executive leadership team, managing a staff of four investment managers and several analysts who build opportunities for transformational change for children. The EDI will identify and create large-scale, global funding opportunities to present to CIFF's Board of Directors. These opportunities will require creativity to ensure the most effective delivery models, partners, and detailed assessments of associated risks. The Investment team collaborates with potential partners to ensure that funded initiatives have strong implementation, monitoring and evaluation plans and a high probability of success. In addition, the new EDI will help to ensure a smooth transition of partner relationships to the CIFF Programme team once initiatives are approved.

The successful candidate will have the gravitas and credibility to present to CIFF's board and engage with high-level officials throughout Europe, Asia, and Africa. The EDI will have at least 15 years post graduate experience working on a global scale and be willing to live in London. He/she should have excellent analytical and leadership skills and have proven success in creating complicated, multinational deals. This is an exceptional opportunity for an entrepreneurial, creative leader to affect change for children on a global scale.

Please let me know a good time and number to reach you. However, if more convenient, feel free to email me any suggestions for candidates and/or sources. Also, please feel free to share this job specification within your network.

Thank you for your consideration.

**Name**
**Contact Information**

## Sample Assessment Grid

An assessment grid can help you systematically compare candidate resumes, making the screening process more objective.  To create a grid, use the requirements you have stipulated for your job description.  In the example below, we have listed the requirements found in the VP of Finance sample job description.  Often, job descriptions include both quantitative and qualitative requirements; the qualitative pieces can be difficult to assess from a resume and you may choose not to include them in the process, or you may choose to rank them differently.  Regardless, you will want to use the interviews to probe further on the qualitative aspects of a candidate's experiences.

**Directions**

- Place job description criteria in the left-hand column, highlighting the top three to five characteristics of the ideal candidate.
- Rate the candidate based on whether the skills and experiences outlined in the resume exceed, meet, or do not meet the criteria. Each candidate is ranked on a scale of 1 – 5, with 5 being the highest.
- Compare totals (taking into account lack of full information on some candidates) to rate candidates against one another.

See next page for sample grid.

## Sample Assessment Grid

| Skills and competencies | Candidate A | Candidate B | Candidate C | Candidate D |
|---|---|---|---|---|
| **Sample quantitative requirements** | | | | |
| CPA and/or advanced degree in business, public administration | 2 | | | |
| 8-10 years senior management experience in financial management, accounting, and operations | 3 | | | |
| Experience developing and managing accounting staff | 3 | | | |
| Ability to plan, organize, and think strategically | 2 | | | |
| Ability to manage projects, partnerships, and professional relationships | 2 | | | |
| Experience developing budgets, managing private and government grants | 1 | | | |
| Experience using accounting and contact management software | 1 | | | |
| | | | | |
| **Sample qualitative requirements** | | | | |
| Strong sense of ownership in department functions | 3 | | | |
| Ability to work with all departments, a diverse team | 2 | | | |
| Hands-on manager with impeccable integrity | 2 | | | |
| Highly organized and flexible in dynamic environment | 4 | | | |
| Strong written and verbal communication | 3 | | | |
| Strong presentation skills | 2 | | | |
| Commitment to mission and values | 2 | | | |
| | | | | |
| **Total Score** | **32** | | | |

## Sample Interview Questions

**Sample "beginning" questions:**

- Tell me about your current/most recent role at XYZ organization.
- Why are you interested in working in the XYZ role at our organization?
- What skills/experience do you hope to gain working at XYZ organization?

**Sample "results" questions:**

- What do you see as your greatest achievement in your role as ABC at XYZ organization? Why?
- What do you see as your greatest challenges/failures in your role as ABC at XYZ organization? Why?
- What are the most significant weaknesses in your performance? How do you compensate for those weaknesses?
- Describe the job where you have been least effective. What do you think the reasons are?
- Give me an example of where you disagreed with a decision your boss and/or colleague made. What was the situation? How did you handle it? What was the outcome?
- Tell me about a time when, because of your analysis, there was a major change of direction or key decisions in your organization.
- What was the most difficult/complex decision you had to make in your last position? Would you do it differently next time? If so, how?
- What is your decision making style? Provide an example of when you have made a rapid decision and when you took a significant amount of time to make a decision.
- How do you plan your work? Prioritize your work?
- If your most recent supervisor had to characterize your strengths and weaknesses, what would he/she say?
- How comfortable do you feel working in an ambiguous environment? Describe a situation where you have had this experience.
- Describe a typical day at your last (or current) position.

**Sample questions to understand a candidate's ability to manage and work in teams:**

- Provide some examples of working in a team environment. What was your role? What was your contribution?
- Think back to a team meeting you recently participated in. What was your role in this meeting?
- What is different about the way you and your most recent supervisor manage people?
- Give me an example that describes your working style (e.g., probe for independent vs. collaborative; deadline-focused vs. not…).

- Tell me about the best and worst supervisees you have ever managed. How did you work with these supervisees?
- Give me an example of how you have provided professional development opportunities to your supervisees.
- Give me an example of when you have persuaded a colleague or team member to change his or her approach. How did you do it?
- If your most recent supervisor had to characterize your ability to work in a team, what would he/she say? And your supervisees?
- How do you give feedback? How do you take feedback? Provide examples.

**Sample "bridger candidate" (those moving from for-profit to nonprofit) questions:**

- Tell me about your experiences volunteering at XYZ organization (use resume information about past and current nonprofit experience). What did you like best about it? What did you like least about it?
- Why do you want to work in the nonprofit sector?
- How do your experiences translate to the nonprofit sector?
- How do your experiences in the ABC role at the XYZ Corporation translate to this role at our organization?
- Why do you want to work with our organization?
- How does our mission tie to your passions?
- What are your expectations about working in the nonprofit sector?
- What is your leadership style? Describe a team meeting you recently attended—what was your role? How did you interact with your team?
- Tell me about a time when you have worked in an environment that makes decisions in a consensus-driven way.

**Sample "cultural fit" questions:**

- What did you enjoy most/least at your previous job?
- Where do you see yourself in three to five years?
- What is important to you in a workplace?
- What qualities do you look for in a supervisor? In a colleague? In a supervisee?
- What are your passions? How do your passions tie to the mission of this organization?
- What is your leadership style?
- How do you make decisions?

## Sample Reference Check Questions

A number of sample questions are listed below.  You may also tailor questions to specific areas you'd like to probe about each candidate, or to how he/she would respond to specific aspects of the job under consideration. The person offering the reference will be able to tailor his or her responses to what is most relevant if you first give a sense of the position and what would be expected of the candidate.

Though it is helpful to have some sample questions and other written prompts ready as necessary, reading directly from a list of questions may set an unnecessarily formal tone.  Do your best to make the person giving a reference feel as though he or she is having a natural, flowing conversation.

**Opening the conversation**

- Please tell me a little bit about yourself and how you know XX?  (How long, in what context; how often were you in contact, etc.)

**General impressions**

- How would you characterize your experience working with XX?

**Personal attributes**

- What kinds of personal qualities come to mind when you think of XX?

**Achievements**

- What impact has XX had on the organization?  In his/her department?
- What are his/her biggest accomplishments or key contributions to the organization (examples)?
- How does this person compare with other executives in similar positions in your organization or comparable organizations?
- What kind of legacy did XX leave?

**Leadership skills**

- How would you describe XX's style of leadership?
- How is she/he a visionary?  Examples?
- How has he/she been able to increase the visibility of the organization?
- How creative is XX in building resources and diversifying funding?  Has he/she done fundraising?

**Strategic thinking abilities**

- What involvement did XX have in developing the strategic plan for the department or organization? What specifically did she/he contribute?
- How has XX demonstrated his/her strategic thinking ability? Examples?

**Management style**

- How would you characterize XX's general management style? (e.g., authoritative, consultative, task-master, etc.)?
- How does XX go about managing up?
- What type of work environment does he/she need to succeed?
- How would XX's direct reports describe his or her management style? Supervisors?
- How does XX go about making tough decisions? Is she/he inclusive? Fair? Abrupt? Random? Other?

**Operational effectiveness**

- Please describe his/her operational and (if relevant) financial management abilities.
- What types of policies, procedures, or processes did XX implement?

**Emotional intelligence**

- How does XX deal with conflict? How rigid or flexible is she or he?
- How did you see him/her grow while you were working together?
- How well does XX build consensus among constituents with differing opinions or interests? Examples?

**Internal and external communication skills**

- How would you describe XX's communication skills: verbal and written?
- How well does XX listen? How does she/he engage people?
- How often and did XX keep his or her supervisors, direct reports, peers, etc. updated? What methods did he or she use?

**Areas for development and support**

- Given that no one is perfect and everyone has areas in which he or she can improve, can you describe any areas XX can or should continue to develop?
- From what you have shared, can you tell me how this trait has impacted XX or the rest of the team? Do you see any liabilities or downsides to XX taking this position?

- What have been XX's biggest professional challenges? How did she/he overcome them? Examples?
- If you were to do an appraisal on XX, what would his/her development objectives be?
- What would you see as the ideal position for him/her? Why?
- Where does XX need the most support?

**Closing**

- How would you summarize XX as a candidate for this position?
- Is there an experience that you have had with XX that is particularly memorable to you?
- Why did XX leave the company? Was it his/her decision?
- Would you hire or work with him/her again? If not, why not?
- Is there anything else that I should know about before moving XX forward in the process? (A MUST-ASK QUESTION!)
- Is there anyone else you could recommend as a reference who might have seen XX from a different angle?
- Thank you so much for your help and insight. Do you mind if I contact you again in case I have additional questions?

## Offer Letter Template

Date
Name of Candidate
Candidate Address

Dear Candidate:

**Congratulations and offer extension**
We are delighted to extend an offer to you for the POSITION NAME at ORGANIZATION NAME. You will be reporting to INSERT NAME the INSERT TITLE and will be starting on INSERT START DATE. For your reference, a copy of the job description is enclosed.

**Salary and benefits information**
Annual salary and terms of payment (e.g., weekly, monthly).
Benefits (medical, dental, retirement plans, vacation, etc.).
Other, if applicable (e.g., relocation expenses, commuting expenses, severance package, other position-specific benefits).

**Job performance evaluation**
Frequency of performance review and the person or party who will be reviewing the position (for example, the Board of Directors will review the Executive Director).

**Closing and signatures**
Both the organization representative and the candidate should sign and date two copies of the letter. Provide instructions to the candidate on how to return the organization's copy (mail or fax) and by when.