

# The Well-Managed Hiring Process

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*Presenter*

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# Training Resources for the Environmental Community (TREC)

- Serving Western North America environmental nonprofits since 1998
- Capacity builders, primarily supporting Wilburforce Foundation grantees
  - Organizational Effectiveness
  - Fundraising Assistance
  - Fiscal Management
  - Leadership Development
  - Human Resource Consulting



# The Well-Managed Hiring Process

## What we're here for today

- Describe key steps in an effective hiring process
- Identify actions and tools for navigating each step
- Identify important considerations in assuring equity in hiring decisions
- Emphasize the importance of a smart hiring approach and how it fits into a larger discussion of strategy

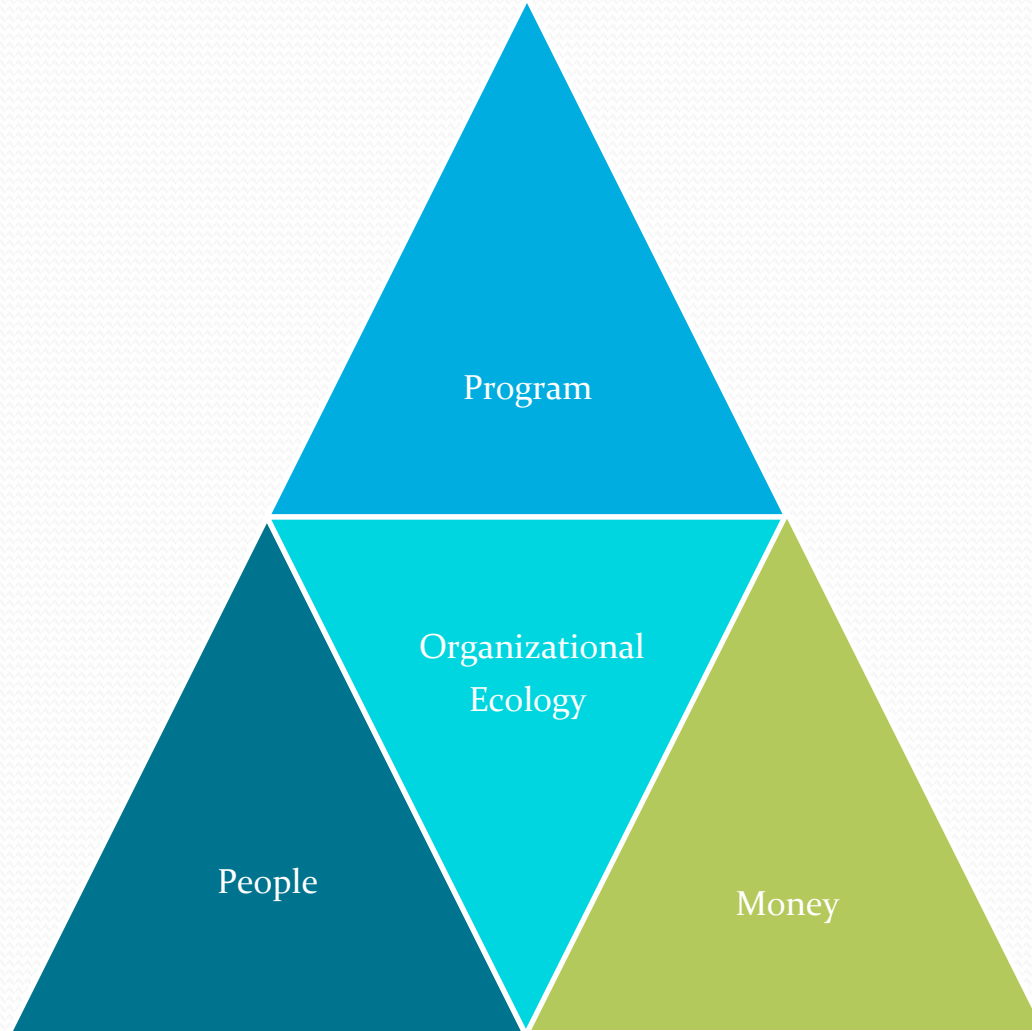
# Webinar Protocol

*Use chat window for questions*

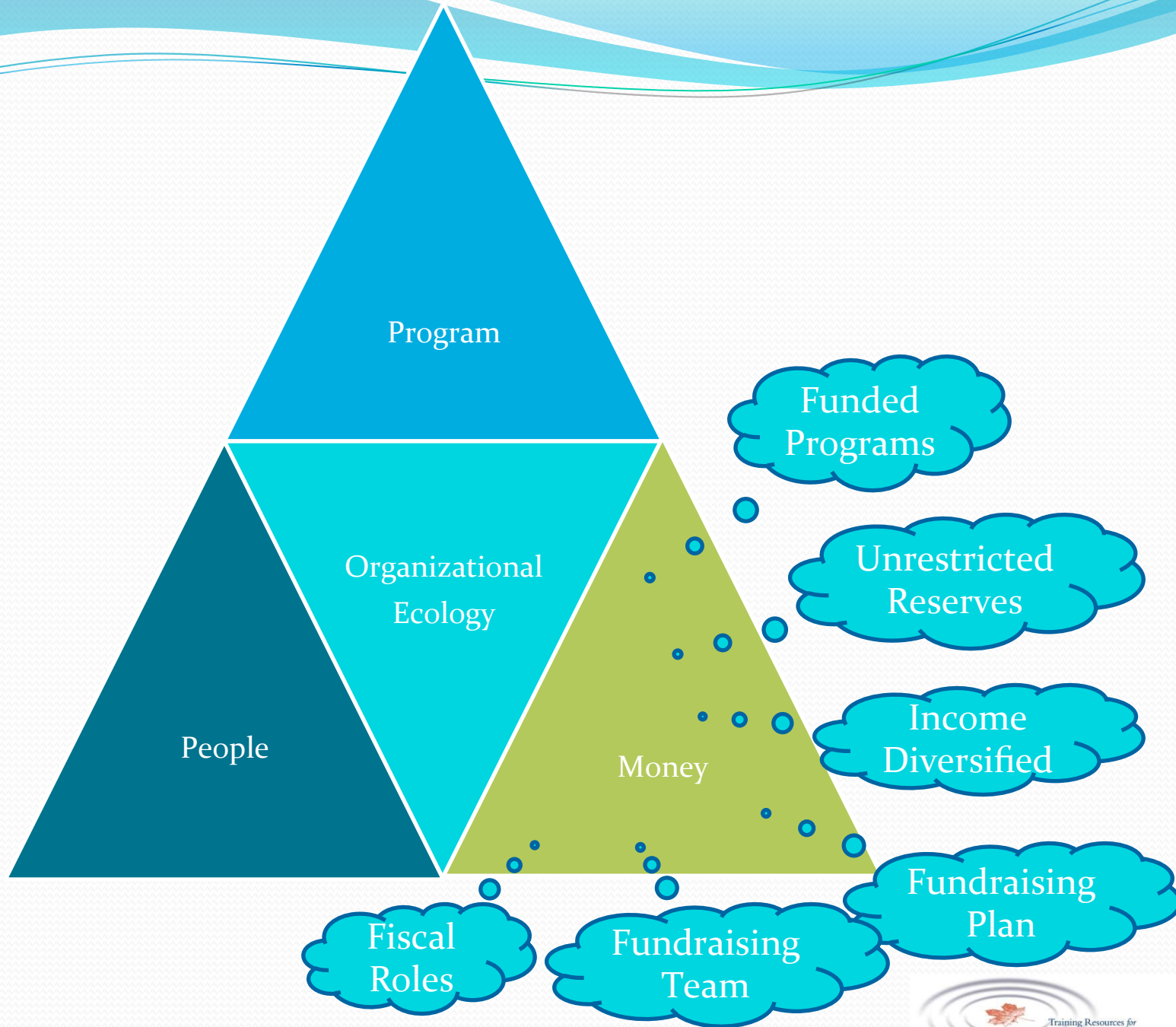
*Stay on after the presentation for further Q & A*

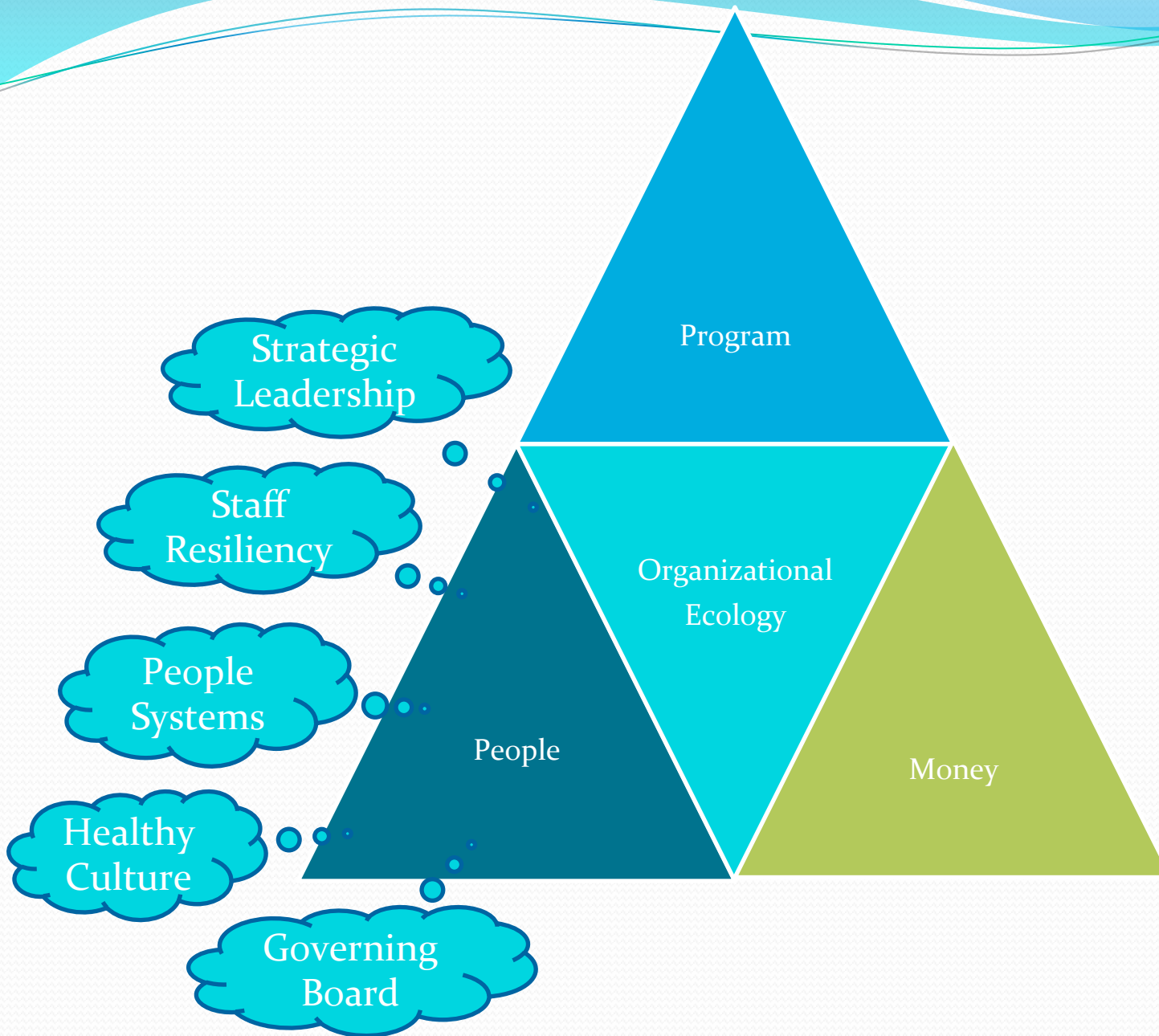
*Contact us for help with specific issues*

# TREC's Organizational Ecology Model











# The “excellent people system”

- Most of us are focused outwardly, on the work
- Yet substantial energy needs to be dedicated to “sailing the ship”
- Effective systems require thought, investment, maintenance, marketing . . .
- Taking the “small bite” approach yields maximum benefit
- Start where you are!



# The Well-Managed Hiring Process

*What problems or issues  
have you seen  
in the hiring process?*

*Add your thoughts to the chat window*

# Common problems in hiring

- Not clear what (or who) we're looking for
- Mismatched or unqualified candidates
- The paperwork is a mess
- Interviews are conducted poorly
- No one knew what was going on
- The final selection was a mystery
- The new person didn't last

*Begin with the end in mind*



# The Well-Managed Hiring Process

## *Six Steps to Success*

*Preparing*  
*Seeking*  
*Assessing*  
*Selecting*  
*Integrating*  
*Building*



# Step 1: Preparing

- Assess the need you are filling  
*Describe the position role, boundaries, objectives and authority as clearly as possible. Also the cultural “fit”*
- Identify stakeholders and timeline  
*Decide who to involve or inform, and how the process will unfold*
- Clarify chain of command  
*How does this position fit into your org chart?*



# Step 1: Preparing

- Create behavior-based job parameters  
*Define the success factors for the job*
- Evaluate KSA's  
*Assess qualifications required for success in the position—both technical and cultural*
- Plan for growth and change  
*Plot where the position is going—what will it require in a year?*



# Noble Truths

*Chance favors the well prepared mind*

*Hiring is as much science as art*

*Start early and pay attention to detail*





## Step 2: Seeking

- Go beyond the “usual suspects”  
*Build the broadest practical outreach plan you can*
- Use every outreach channel available  
*Post to standard job search sites, also consider advertising with agencies, lists, university and alumni groups, recruiting firms and others*
- Tap into every network related to the position and field of work  
*Involve staff, Board and volunteers in outreach*



## Resources for Posting Job Announcements

Once you have clarified the requirements for your open position, and created a suitable job announcement, it is time to advertise the position and distribute the announcement. Not surprisingly, the wider and more diverse the outreach, the more people will learn of your opportunity, respond themselves, or forward to others who may wish to apply.

As might be expected, there are *many* online resources available to your organization to utilize in your candidate search. You will see a range of different options here, ranging from generic job websites to ones that are more specific to the type of position you are seeking. General job boards, such as **Indeed** or **SimplyHired**, will give you a wide range of possible candidates. Smaller, more targeted job boards will allow you to get resumes or responses from people that are relevant for the open position. You may not get as many candidates as on a large job board, but they may be more qualified and therefore accelerate the search process.

Typical job sites serve two different groups: job seekers and employers. On many websites, job seekers can upload their resumes so you can search for potential candidates. Some websites also provide job seekers additional resources such as highlighting possible positions, alerting seekers to new listings, and tracking cover letters and applications.

For the employer, these websites provide you the ability to post a position, check resumes of candidates, receive email alerts regarding a possible candidate, receive applications on line and even employ recruitment services to aid in your job search. Costs for posting positions vary widely, as do the services offered for free and at a cost.

### Tips to Improve your Search

- 
- Advertise using a traditional job title (Development Director vs. Chief Fundraiser)





## Step 2: Seeking

- Make all documentation match  
*Job description, outreach materials, evaluation tools should align*
- Manage communications effectively  
*Track all messaging for consistency*
- Create a system for tracking prospects and paperwork  
*Anticipate the need for systems to manage applications and resumes*



# Noble Truths

*The broader the outreach, the more  
diversity you will attract*

*Greater response begs a better system*

*Plan to avoid bogging down in details*



## Step 3: Assessing

- Develop appropriate criteria  
*Be sure to evaluate to a standard*
- Structure interviews for success  
*Create scripts and protocols for phone and in-person interviews*
- Use fair and legal questions  
*Emphasize behavioral interview questions*
- Use a scoring system  
*Ensure that all candidates are evaluated equally*



# A Noble Truth

*You must confront bias*





# Bias Comes in Many Packages

*Stereotypes of every kind*

*Halo or horns effect*

*Recency effect*

*“Just like me”*

# Use of a Qualification Matrix

- Specifies the competencies and qualities you are looking for
- Puts them into a format you can use for screening resumes
- Allows for accurate record keeping



Candidate	Wells	Carlota	Crawford	Lucas	Oduye
<b>Qualification</b>					
Education					
Experience					
Industry knowledge					
Donor research					
Donor cultivation					
Marketing skill					
Development admin					
Results					
Communication skills					
Collaboration					
TOTALS					
<b>Scoring</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
	Unacceptable	Below standard	Proficient, meets standard	Exceeds requirement	Excellent

# Interview Questions

- Interviewer should follow a script
- Questions must be written ahead of time
- Plan to document candidates' responses
- Consider how candidates prepare

# Types of Questions

- Background
- Traditional
- Situational or hypothetical
- Behavioral

# Background Questions

- Tell us about your educational background
- Your resume says you worked for Senator Snodgrass. What were your duties there?
- This position requires advanced skills in Excel. What is your proficiency with Excel?

# Traditional Questions

- What are your strengths and weaknesses?
- How would you describe yourself?
- Where do you see yourself in five years?
- Why should we hire you?
- If you were a dog, what breed of dog would you be and why?

# Situational Questions

- How would you handle a situation where you had to make a decision based on ambiguous or incomplete information?
- On a joint project, your partner is not doing their share of the work. What would you do?
- What would you do if a higher-up asked you to do something you considered to be unethical?



# A Noble Truth

*Hypothetical questions don't tell you much*

*“What if...”*

# Behavioral Questions

- Give me an example of an important work-related goal you have had and your success in accomplishing it.
- Describe an situation where you asked an employee to make a decision or carry out a task with minimal guidance from you.
- Tell me about a time when you were able to establish rapport with a “difficult” person. How did you go about it, and what were the results?





# A Noble Truth

*Behavioral questions yield the most useful information*

*“Tell me about a time . . .”*



# A Noble Truth

*Past performance  
is the best indicator  
of future behavior*

# Illegal or Improper Questions

**Any question** related to age, disability, genetic information, national origin, race, color, religion, sexual preference or family status **could be unlawful**

*unless there is a specific and legitimate reason for needing that information*

# Proper or Improper Question?

- What year did you graduate high school?
- What is your understanding of the mission of our organization? How is this important to you?
- What is your financial situation? Do you have debts or loans?
- Have you ever been convicted of a felony?

# Proper or Improper Question?

- What is your political affiliation?
- Do you have a valid driver's license?
- Do you have future plans for marriage and children?
- How many days did you call in sick last year?
- Do you believe climate change presents a credible threat to humanity?

# Phone Screens

- Eliminate most resumes before calling people
- Probe for complete answers
- Score against a set of criteria and document in a matrix
- Candidates who best match your criteria will emerge

## Interview Record Form

Position: Administrative Director  
Candidate: Wells

Interviewer:  
Date:

Rating scale: 1 = unacceptable, 2 = below standard, 3 = meets standard,  
4 = exceeds requirement, 5 = excellent

	<b>Question/Competency</b>	<b>Response</b>	<b>Rating</b>
1.	Tell me about a previous administrative position you have held. Describe the work environment and the responsibilities you had.		
2.	Describe a time you had to be excellent at multidirectional communication in order to complete a work project.		
3.	Tell me about a project that best demonstrates your analytical abilities.		
4.	Give me an example of a time you used written communication to share information that, in hindsight, you realize should have been shared verbally.		
5.	What attracts you to us? In your understanding, what is our mission?		

# In-person Interviews

- Same rules as phone screen, only more rigorous
- Prepare for *prepared candidates*
- Create a welcome environment
- Employ various interview formats
- Sell the position and your organization
- Avoid promises



## Interview Record Form

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# Evaluating and Comparing Candidates

- Use a candidate ranking system
- Use evidence to select the most qualified candidates
- Come to a final reckoning using head *and* heart
- Forge consensus

<b>Operations Director Skills/Experience/Attributes Chart</b>					
	<b>Candidates by Order of Interview</b>				
	Name	Name	Name	Name	
<b>Do</b>					
Staff management experience					
Foundation and grant writing experience					
Budgeting/Accounting experience					
Work/Strategic planning experience					
<b>Display</b>					
Commitment to mission					
Humility/sense of humor					
Collaboration					
<b>Deliver</b>					
Budget					
Strategic plan					
<b>Scoring</b>					
Total Score					
Average score					
Median score					
Number of top ratings					
<b>RANKING BY SCORES</b>					
Scoring 0-10, 0 = none or not applicable 10 = fully proficient/has that quality					
Bold indicates top score within candidate pool					



# Noble Truths

*Bias is inherent in selection—watch out!*

*Assess against criteria*

*Use a standard format wherever possible*



## Step 4: Selecting

- Check references  
*Create a script and process*
- Work effectively with finalists  
*Slow down as final decision approaches*
- Negotiate salary, benefits and other factors  
*Total compensation is important for both parties*
- Think long term  
*Project where the trends might take you*



# Noble Truths

*Your first choice may not work out*

*Take your time*

*Build lasting relationships*



# Step 5: Integrating

- Reinforce support systems  
*Anticipate the new person's needs*
- Orienting vs onboarding  
*Strive to provide context, background, introductions*
- Probationary periods  
*Allow both parties a trial run*
- Provide feedback  
*No one performs well in a vacuum*



# Noble Truths

*Hiring is just the start*

*The first period is critical*

*“It takes a village”*





## Step 6: Building

- Track and evaluate the process  
*What worked, what would you change next time?*
- Build organizational capacity  
*Hiring opportunities will come again. Wheel reinvention is not required.*



# Noble Truths

*Hiring is a complex undertaking*

*Build your skill*

*Create institutional paths to success*



# The Well-Managed Hiring Process

## *Six Steps to Success*

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*Seeking*  
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*Integrating*  
*Building*

# **Managing Transitions in Leadership**

## **Finding and Keeping a Great Executive Director**

*A Guide for Boards of Directors of Conservation Organizations*

**Written by Dyan Oldenburg, TREC Executive Director and  
David Thomson, and Dan Schwab, TREC Senior Associates**



Our thanks to Wilburforce Foundation  
for its generous support of this guide

# Common problems in hiring

- Not clear what (or who) we're looking for
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# Noble Questions

*Are you thinking long term?*

*Who are you serving?*

*What is ultimately best for your clients  
and your organization?*

*How do you build this skill for the long run?*

# Disclaimer

*TREC does not provide legal guidance.  
Please be aware that it is your organization's  
responsibility to obtain legal advice  
and/or review of legal documents as needed.*



# Want more?



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