



The Nonprofit Hiring Toolkit

How to find and hire the best talent

Table of Contents

Introduction.....	4
Building the Recruiting Team.....	5
Writing the Job Description.....	8
Sourcing Candidates.....	10
Finding the Job Candidates You Want.....	10
Using Social Media in Nonprofit Talent Acquisition.....	14
Processing Applications and Screening Resumes.....	18
Conducting Successful Interviews.....	23
Sample Interview Questions.....	28
Legal and Illegal Interview Questions.....	31
The Reference Check: More than a Formality.....	35
Extending an Offer.....	41
Managing a New Employee's Transition.....	43
Set Your New Nonprofit CEO Up for Success: Start With an Employment Agreement.....	45
Appendix: Sample Nonprofit Job Descriptions.....	49
CEO/Executive Director/President Sample Job Descriptions	50
Executive Director (Small Organization).....	51
President (Medium Organization).....	53
Chief Financial Officer and Finance Sample Job Descriptions	56
Chief Financial Officer (Complex Funding).....	57
Chief Financial Officer (Small Organization).....	60
Chief Financial Officer (Medium Organization–Straightforward Financing) ...	63
Chief Financial Officer (Large Organization).....	66
Controller.....	69
National Controller.....	72
Director of Finance and Administration (Small Organization).....	75
Managing Director, Finance and Administration.....	78
Chief Operating Officer Sample Job Descriptions	81
Chief Operating Officer (Operations/Administration).....	82
Chief Operating Officer (Generalist).....	85
Chief Operating Officer (Program-Focused).....	89

Chief Operating Officer (Strategy/Operations)	92
Deputy Director.....	95
Vice President, Finance and Operations.....	97
Communications Sample Job Descriptions	100
Vice President of Communications.....	101
Director of Communications and Public Affairs.....	104
Development Sample Job Descriptions	106
Vice President, Development	107
Director of Development (Small Organization)	110
Director of Development (Large Organization).....	112
Evaluation and Measurement Sample Job Descriptions	114
Horizons for Homeless Children: Director of Evaluation and Innovation	115
Latin American Youth Center: Director of Learning and Evaluation	119
The Mission Continues: Research Director	122
ORBIS International: Director of Monitoring and Evaluation	125
Programs Sample Job Descriptions	128
Director of Programs.....	129
Vice President of Regional Programs and Operations	131
Vice President, Programs.....	134
Related Sample Descriptions	137
Organization Overview Sample.....	138
Email Job Announcement Sample.....	140

Introduction

Hiring decisions are challenging, and engaging in a thorough process requires time and energy.

In addition, every hiring decision contains an element of risk and ultimately requires a leap of faith. No matter how well you know your final candidate, it's impossible to be 100 percent certain how he or she will perform in the new role. However, executing a disciplined, rigorous search process like the one outlined in this tool kit will help to mitigate the risks.

The Nonprofit Hiring Toolkit explores eight important steps to the hiring process:

- Building the recruiting team
- Writing the job description
- Sourcing candidates
- Processing applications and screening resumes
- Conducting interviews
- Checking references
- Extending an offer
- Managing a new employee's transition

When these steps are done well, and thoroughly, they can help your organization find and hire the best talent for its open positions.

Building the Recruiting Team

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 help you scope the position, screen resumes, interview, and manage your new hire's transition.



From writing a job description to conducting interviews to extending an offer, a disciplined, rigorous search process will mitigate the risks of hiring new employees for your nonprofit organization. This tutorial provides step-by-step advice from recruiting experts to help you hire with confidence.

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 two to 10 members, depending on the size of your organization and the level of the position. You also may 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. A search for direct reports to the ED will tend to involve one to three staff members and possibly search professionals, but typically not the board. Once you have selected the team, clearly outline each team member's responsibilities.

The role of the team is to fully engage in the search process. Members can 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: Will one individual (e.g., the ED) be responsible for the final choice? Will a subset of the hiring team make the decision?

You can break down the team's tasks into a simple list that makes it easier to manage team members' roles and responsibilities:

- Identify organizational needs.
- Define the position and identify characteristics of the ideal candidate (include hard skills, soft skills, and preferred work style).

- Write the job description.
- Network and advertise the opening.
- Gather, organize, and screen resumes.
- Assess candidate resumes according to established criteria to reduce pool of candidates suitable for preliminary interviews.
- Conduct preliminary interviews (by phone or video technology such as Skype, videoconferencing, and/or FaceTime).
- 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 the final choice, and extend and negotiate the 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 its mission and goals. Some questions to ask include:

- What are our strategic goals and what will it take to get there?
- What are the roles and responsibilities of our current staff members? 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 members contribute to meeting those goals, what role and responsibility gaps begin to emerge?
- What are the expectations for this newly created position? What are the roles and responsibilities? How does this role fit within the existing team structure? What experience and/or specific functional 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 your organization? What other compensation components (e.g., health/dental/vision, vacation, retirement program, relocation reimbursement, 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 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 hire help you fill your gaps? Can the requirements that the team has sketched out realistically be found in one person or does the organization require restructuring? If you have determined that your organization is well-structured but requires the new hire to complete the team, you can begin to write the job description. If not, it's important to gain clarity on the ideal structure and how to get there before moving forward.

Sample Recruiting Timeline

Week	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	
Assemble hiring team and develop plan	■	■																	
Create job description	■	■																	
Develop assessment tools	■	■																	
Conduct outreach and develop candidate pool	■	■	■	■	■	■	■	■	■	■									
Acknowledge applications/receipt of resumes			■	■	■	■	■	■	■	■									
Prioritize resumes					■	■	■	■	■	■									
Conduct preliminary interviews						■	■	■	■	■									
Hold review meeting; choose candidates to move forward								■	■	■									
Conduct in-person interviews										■	■	■	■						
Check references											■	■	■	■					
Make decision; extend/negotiate offer														■	■				
Close search process; contact those not selected																■	■		
Manage the transition																■	■	ONGOING	

Writing the Job Description

A clear and comprehensive job description is key to attracting strong candidates. Before embarking on this process, you will need to have developed a clear sense of the qualifications, responsibilities, and expectations for the position you wish to fill.



Once your team has clarified these dimensions, you can begin to craft the job description. Here we offer a few tips.

Begin the job description with an overview of your organization. The overview includes information such as the organization’s 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 for them.

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 or her qualifications with the opportunity and the specific job requirements. In our experience, having three key areas of responsibility works well; 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 best candidates. You also will avoid scaring off highly qualified individuals who may lack one specific attribute listed as a requirement when in reality it is 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. 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 is just beyond the range you’ve publicized. Occasionally,

job posting websites require compensation ranges, and some have preset ranges, which can require you to choose a range that extends beyond the parameters your organization has set. However, you can often choose to say: Compensation is commensurate of experience.

Decide on a title that makes 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 the candidates best-suited to your organization's needs. Investing the time and effort in writing a clear job description will enable your organization to accurately articulate the opportunity to potential candidates.

Finding the Job Candidates You Want

It will happen. An integral member of your team will move on from your organization, leaving in her place a big hole for your nonprofit to fill. You think, “How will we ever replace her?”



That’s a good question. Stiff competition exists for today’s best and brightest, and jumping into the fray to develop a candidate pool can seem like a futile exercise. But creating a strategy before attempting to fill the talent pool will not only help you find someone to fill an opening, but also put you in a better position for the next time someone leaves.

In building this strategy, the search committee should first ask itself questions like: how can we target the right individuals, 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? Whom do we know who might know those individuals?

To help get at answers to these questions, a good candidate sourcing strategy helps an organization do four things:

1. Determine who it already knows
2. Research who it wants to know
3. Tap networks with people the organization wants to know or whom it wants to have as advocates during the search process
4. Build awareness of the opportunities available in the organization

Taken in this direction, the outreach process becomes a “network development campaign,” through which your nonprofit isn’t only looking to fill one position on a team but is using the open position as an opportunity to pull in talent for potential future openings, too.

Take Stock of Whom You Already Know

To begin, an effective search committee will take stock of whom it already knows. On a document in table format, the committee creates columns for committee members' names; the individuals they'd like to contact; the reason for the referral (e.g., 10 years' experience as a CFO); and general comments (i.e., notes about the interaction the committee member had with the individual, etc. and outcomes of conversations). This becomes the committee's living document, growing over the course of the search. It also becomes a powerful tool for future searches (imagine those individuals you would like to recommend for a different opportunity, even if they weren't ideal for this one) or simply for building the organization's networks.

When search team members do reach out to their contacts or potential sources of candidates, make sure the team is in clear agreement on the top three to five characteristics of the ideal candidate. Consistently evaluating candidates against the same three to five characteristics allows the team to focus on the most qualified candidates.

Of course, you will want to go beyond the personal networks of your committee members to broaden your candidate reach. Social media and affinity or professional groups provide other channels for sourcing candidates.

Use Social Media to Promote Jobs and Find Candidates

Tools such as LinkedIn, Facebook, and Twitter can serve two purposes in sourcing candidates. One, they can help promote your organization to potential candidates, and two, they can be used as tools to find candidates.

With more than 400 million users worldwide as of April 2016, LinkedIn is the world's largest professional network, making it a must for nonprofits on the hunt for new talent. Nonprofits can create free "[Company Pages](#)" on LinkedIn, which other LinkedIn members can follow, to create visibility for their organizations' mission and services, press, blog posts, new hires, job opportunities, and more. Through its paid service, [LinkedIn Recruiter](#), nonprofits can search for people with specific skills and expertise.

Facebook offers nonprofits the ability to engage followers, and potential talent, in a widespread, personal way by allowing you to tell the story of your organization. Some ways organizations are doing this is by sharing behind-the-scenes looks into their cultures, work, and histories. Others highlight descriptive stories and photos, success stories, and developments in their fields.

Nonprofits also are using Twitter to build community and engage in relevant conversations. Some organizations even use it to source and recruit candidates as part of their overall social media strategy. One such organization is NPR, which put Twitter at the center of its recruitment strategy by promoting open positions and creating an account that gives an inside look at working for the organization.

In a 2015 survey by the Society for Human Resource Management, which looked at nonprofit and for-profit use of social media in recruiting and selection, 84 percent of organization said they use social networking sites to recruit candidates. Those who do not use social media to recruit employees cite worry over legal risks or discovering protected information that would prevent an equal employment opportunity, and not having enough HR staff time to use these tools in addition to the others they are using, as reasons for their hesitation.

Legal fears are understandable, and as social media gains more traction as a recruiting tool, nonprofits need to consider the potential legal liabilities of using it for this purpose. For example, eliminating someone from your list of potential candidates based on information found through a social media website could open your organization up to accusations of discrimination or special treatment.

Overall, it is important for a nonprofit to be explicit about the use of social media in their hiring process and to consider legal counsel when developing policies related to using these tools to recruit and hire employees.¹ Considering the growing popularity of social recruitment, as well as its promise, it's worth developing a robust and detailed strategy that specifically speaks to that area of your nonprofit's social media use.

Awareness Build with Job Boards

While many today would tout that networking is the best option for finding great talent, organizations find that online job boards can help them cast a wider net for their searches while also being helpful in targeting candidates in key functional areas or in different geographies.

Specialized sites, such as [Bridgespan.org's job board](http://bridgespan.org), [Idealist.org](http://idealists.org), and *The Chronicle of Philanthropy's Philanthropy Careers* promote open positions to individuals interested in nonprofit careers. Field-specific job boards, such as [HigherEdJobs.com](http://higheredjobs.com), which is geared towards work in higher education and [DevEx](http://devex.com), a leading global development job board, help focus your search on individuals within specific fields.

¹ For more on the legal aspects of using social media in the hiring process, see "Use Social Media for Recruiting, Screening, and Background Check?", <http://humanresources.about.com/od/selectemployees/qt/why-use-social-media-for-recruiting-and-screening.htm>, and "Update Your Recruitment and Selection Process with Social Media," <http://www.recruitingdivision.com/update-your-recruitment-and-selection-process-with-social-media/>.

Tap Networks to Find Diverse, Skilled Candidates

Affinity groups and professional networks serve a couple of purposes: They can help you home in on specific skills and roles that align with the work you're hiring for and they can help your organization ensure a level of diversity in your candidate pool. The key is to seek out the most appropriate network for your hiring needs. For example, if you're looking for a CFO, the Financial Executives Networking Group or other finance-related networks would be highly relevant.

Outside of tapping into groups with functional expertise, affinity groups and professional networks also can help you source diverse candidates. One mistake organizations often make is moving to the interview stage before getting a significant level of diversity in the pool. Your search committee should take the time to carefully think about channels it can target to recruit diverse candidates. Consider using local print and digital media that target specific neighborhoods, associations like [the Black Ivy Alumni League](#) or the [National Society of Hispanic MBAs](#), or conferences focused on a specific group or an issue relevant to the groups you wish to reach.

Conclusion

Organizations should constantly be on the lookout for new talent to help build their pipelines of potential candidates. An ongoing sourcing process will allow your organization to build relationships in communities you're likely to tap when a position opens and ultimately will result in expanding your resources for finding candidates overtime.

We'd like to thank Kathleen Yazbak, a Bridgespan Group alumnus and the founder of [Viewcrest Advisors](#), an executive search firm, for her help in writing this article.

Using Social Media in Nonprofit Talent Acquisition

Attracting talented people to your organization is one of the most important and, likely, the most competitive tasks facing managers at a time conspicuous for its tight labor pool. This is especially true at the senior and leadership levels where nonprofits increasingly vie for talent not only with other nonprofits but also with the corporate sector.



Social media offers recruiters a set of powerful and, in many cases, free or moderately priced tools that can foster exponential productivity. “As an industry, we’re long past the point where nonprofits can simply post a job and wait for candidates to come,” says Kathleen Yazbak, the founder of [Viewcrest Advisors](#), an executive search firm, and a former Bridgespan partner. “Social media platforms allow recruiters to proactively seek out qualified candidates, shorten time-to-hire, and help raise an organization’s profile.”

A recent [Society for Human Resources Management](#) survey shows that nonprofits trail the corporate sector in using social media. But that gap is closing. Here are a few steps you can take right now to build social media into your talent acquisition mix.

1. Promote your talent brand

According to LinkedIn, 45 million profile views take place on LinkedIn every day—it is the number one activity on the network. The more you can show about who you are, what your company does, and what kind of people thrive there, the easier it will be for candidates to engage with you.

Take a look at your company profiles on LinkedIn, Facebook, and Twitter. Do they make you feel proud to work there? If not, take the critical first step of developing a well curated and compelling social media presence that highlights your company’s distinct culture. You can also use these pages to link to your organization’s human resources or employment pages.

[Year Up](#), which offers educational and career support for low-income young adults, includes employee testimonials and client success stories as well as links to the organization's [careers web page](#). As Year-Up expands into new markets, Talent Acquisition Manager Alison Kaneko is ramping up her acquisition strategy by partnering with her colleagues in marketing. "In the future, we plan to work with our National Marketing team to build and showcase our talent brand through videos and articles on the rewards that come from being part of what we do."

Kathleen Fujawa is vice president, talent, at [Education Pioneers](#), which used to outsource its recruitment function. Fujawa brought it in house and in doing so revved up the organization's social media presence. In addition to what Fujawa lauds as a "small but mighty" marcom team that produces the company's [Impacts and Insights Blog](#) and other social media, Education Pioneers has piloted an internal blog called Open Air to provide a "safe, internal training ground" where staffers can exercise their authorial voices on issues of diversity, equity, and inclusion. "This is the core of our culture and our hope is that some of these bloggers will add to conversations that include external audiences as well," notes Fujawa.

"I'm excited about expanding our blog and other 'culture' features," she says. "That can be a wonderful long-term recruiting tool."

2. Build your talent pipeline

LinkedIn has six million nonprofit members and 22 million members who "follow" nonprofits, according to [LinkedIn for Nonprofits](#). A robust and up-to-date talent pipeline is the holy grail of talent acquisition professionals. As a supplement to maintaining records manually, you can, for a fee, use Talent Pipeline in LinkedIn Recruiter to aggregate, track, contact, and nurture leads. LinkedIn's Advanced People Search function lets you find and filter the best applicants by skillset and/or geography, allowing you to target job openings to the most qualified candidates. Twitter lets you choose the location and current job titles of people you want to reach with your job posting. You can customize key word search to include whole job titles or parts of titles to widen the possibilities. You can also post to professional or other special interest groups—even those you don't follow or who don't follow you.

Kaneko uses Recruiter to post jobs and send "InMail" to source passive candidates. "There are many other options that LinkedIn Recruiter offers, including options to post targeted ads and advertise specific jobs on employee profile pages. We're looking into those options for this year."

Employ your current staff to build a network by asking them to cascade job postings to their personal social networks like LinkedIn, Twitter, and Facebook. "This extends the reach far beyond just the company's social networks," says Yazbak. "Use incentives to reward employees for spreading the word."

Fujawa likes to relate the anecdote of a staffer who was chatting on the website of her old African American sorority and noticed that somebody was moving to New

York City—and looking for job. She connected with the sorority member and ended up hiring her. “It was a great fit and it demonstrated our commitment to fostering a diverse workforce,” says Fujawa.

3. Monitor your results

Documenting and measuring your social media productivity and outcomes isn’t glamorous but will help you build credibility in the long run. The good news is that most social media platforms include useful analytics. Your Twitter, Facebook and LinkedIn pages should enable you and your staff to track which of their friends, followers, or contacts are applying for jobs, which social network they came from, and what stage they are in during the recruiting process.

In addition to talent branding, offer content that appeals to a wide range of professionals at various stages of their careers. Job search tips, career advice, industry news, and thought leadership articles can make your organization a valuable resource.

4. Dos and Don’ts

Every schoolgirl and boy know about the reputational risks of exposing one’s personal life on social media sites. Less well understood are the state and federal laws that limit prospective employer use of social media content in “screening” or conducting background checks.

Suzanne King, a partner at the law firm [Pierce Atwood](#) who advises nonprofits on [employment law](#), says firms should be aware that the [Fair Credit Reporting Act \(FCRA\)](#) may apply if they outsource social media screening. She recommends either conducting social media screening in-house or asking your vendor what they are doing to comply with the FCRA requirements.

To remove even the possible perception of discrimination against protected characteristics, such race, gender, religion, and disability, etc., shield those making hiring decisions from the social media screening process. Have human resources do it and share only job-related information. Check only public sites for social media and refrain from asking candidates to provide passwords to view private content.

Also, know your [state laws](#). “A number of states have off-duty conduct laws that prohibit employers from taking adverse employment action based on conduct outside of work,” says King. “This may include personal information discovered on social media.”

In addition, focus on what candidates say about themselves more than what others say. It’s hard to verify accuracy and credibility of third-party testimonials. “Besides, positive feedback taken out of context may not be that helpful,” explains King. A testimonial that says, “Billy knows what he wants and goes for it!” does

not necessarily mean that Billy can't succeed in an environment that values selfless teamwork.

Most important, if you decide not to hire someone based on something you saw on social media, document the information used. "If you're asked to defend a decision, you want to be able to access the post that made the difference," says King. So, take a screen shot of anything you rely on in making your hiring decisions.

"My bottom line," avers Yazbak, "is nothing replaces clear job descriptions, good interview questions, and due diligence to get at a candidate's qualification in terms of skill and fit. They are the core pieces of your comprehensive recruitment strategy. Social media offers a set of tools to support this strategy."

We'd like to thank freelance writer David Moore for his help in writing this article. David specializes in writing about business, nonprofits, and higher education and can be reached at daveryanmoore12@gmail.com.

Processing Applications and Screening Resumes

You and your team have been thoughtful in defining a position and creating a job description. You have proactively developed an outreach strategy and the description is now circulating widely. How do you prepare 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 those hidden gems. There are several steps you can take to systematically screen resumes to 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, and the availability of team members, you may choose to use a professional recruiter, do this solo, involve only a portion of your team, or include the whole team. If you choose to do this within your senior team/search committee, we recommend you have two people 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 emailed to the point person or recruiter, 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 or via conference call 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. Besides, responding helps promote the organization's brand.
- Create a process to review all resumes. As resumes come in, organize them alphabetically by date received saving them in an email file and, if you wish, assign each a number code. A numbering system ensures that the resume reviewing team receives all of the resumes in the same order and speeds 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.
- If you are managing the process internally, create an assessment grid on which you can evaluate candidate resumes. An assessment grid 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 would 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 us 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 history, 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 nonprofit sector, do you see personal and/or volunteer activities that show the 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 10-plus candidates to phone screen and four to seven to interview (depending, of course, on how many applicants there are overall). (And it may be worth going to more if there are "maybe" candidates who might miss key criteria but bring track records of excellence.)

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. (The "maybe" pile may also be a resource during the interview process as things you learn during the interviews might warrant a closer look at some of your maybes.)
- Discuss what you would probe with each candidate you decide to interview. Remember, you'll have some key questions you will want all candidates to address, while other questions will be specific to each candidate.

- 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. (You’ll want to consider keeping your “maybe” candidates warm, as well.) To expedite this process, create email templates for each category and use a database that allows for insertion of name and email address automatically.

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 on the next page, 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.

Sample Assessment Grid Skills and Competencies

	Candidate A	Candidate B	Candidate C
Sample quantitative requirements			
<ul style="list-style-type: none"> CPA and/or adv. degree in business, public admin. 	2		
<ul style="list-style-type: none"> 8-10 years senior management experience in financial management, accounting, and operations 	3		
<ul style="list-style-type: none"> Experience developing and managing accounting staff 	3		
<ul style="list-style-type: none"> Ability to plan, organize, and think strategically 	2		
<ul style="list-style-type: none"> Ability to manage projects, partnerships, and professional relationships 	2		
<ul style="list-style-type: none"> Experience developing budgets, managing private and government grants 	1		
<ul style="list-style-type: none"> Experience using accounting and contact management software 	1		
Sample qualitative requirements			
<ul style="list-style-type: none"> Strong sense of ownership in department functions 	3		
<ul style="list-style-type: none"> Ability to work with all departments, a diverse team 	2		
<ul style="list-style-type: none"> Hands-on manager with impeccable integrity 	2		
<ul style="list-style-type: none"> Highly organized and flexible in dynamic environment 	4		
<ul style="list-style-type: none"> Strong written and verbal communication 	3		
<ul style="list-style-type: none"> Strong presentation skills 	2		
<ul style="list-style-type: none"> Commitment to mission and values 	2		
Total Score	32		

Conducting Successful Interviews

The interview is an 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 creating a list of three to five questions you will ask of each candidate that speak to the specific needs of the role and/or organization. This will help establish an apples-to-apples comparison across important requirements. However, also recognize that the best interviews are conversational information exchanges and candidates likely will have unique backgrounds and talents you'll want to discuss.

There are a number of things your organization can do to engage in a successful interview process.



Preparing for the interview:

- **Decide what type of interview process is right for this job and who should interview the candidates.** Depending on the level of the position, you may determine that a multistep 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. It's important to be clear, in advance, about what you want to learn during each interview round. A phone interview is often best for discussing threshold skills (scope/scale of management experience, budget size managed, program content, etc.) In-person interviews go deeper and ascertain fit with your organization, workstyle, etc.
- **Inform candidates well in advance** about the interview process and times, type of interviews to be conducted, location and length of interviews, and the team members with whom they will be interviewing.
- **Establish a point person for the process.** Assign an HR person or hiring manager to receive feedback from candidates during the process and to answer any questions they might have.
- **Create consistency across candidate interviews.** It is important for each candidate to be interviewed by the same individuals within the hiring 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.

- **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 the candidates know what to expect in terms of timeframe and next steps in the process.**

Conducting the interview:

- **Create a comfortable atmosphere for the candidate.** Depending on each candidate's knowledge of the organization, the interviewer can provide a short history and describe his/her role in the organization before the interview.
- **Ask open-ended questions.** To draw out significant information from candidates, ask questions that are "open-ended," allowing each candidate to express ideas and explain his or her experience and work style. For example, "what is important to you in a workplace?" instead of, "do you like structure in a workplace?" Or, "tell me about a time you led a cross-functional team" instead of, "have you ever led a cross-functional team?" Also ask questions that can reveal how a candidate might behave in a particular situation. For example, "have you ever had to resolve a conflict between staff members? If so, how did you approach the situation?" Also ask for the candidate's opinion of what he or she doesn't like, e.g., "what is your greatest pet peeve in the workplace?"
- **Interview for results and for examples.** When asking questions, focus on the results the candidate may have achieved. For example, if you are hiring a COO and managing budgets is a key responsibility for the position, instead of asking, "have you managed budgets before?" ask, "what was one of the challenges you encountered when managing budgets in your current (or prior role)?" Then ask, "tell me about one accomplishment in financial management of which you're especially proud."
- **Probe for ability to manage and work in teams.** If the new hire will be required to work with teams domestically or internationally then you might ask, "tell me about an example of your work with international or remote teams. How did you manage a group or team remotely?"
- **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 individual is authorized to work in the United States), race/ethnicity, disability, gender, health issues, marital status, national origin, personal finances, family information, religion, veteran status, military service, sexual

orientation, gender identity, and pregnancy. In addition, do not make hiring decisions based on any of these protected characteristics. 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. If you do ask any of these questions, you could be leaving your organization open to future litigation, whether or not you hire the candidate. (See “[Legal and Illegal Interview Questions](#)” for more details.)

- **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. Think ahead about “good answers” to your questions, but be flexible and open to answers you have not considered. Once you have listened to a candidate’s answers, if there are comments that raise questions, make sure to probe further. Also, for future reference in the review and decision-making process, keep notes as to what was asked and answered.
- **Probe carefully for a candidate 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 missions they’re passionate about. Ask questions that give these candidates an opportunity to explain how their skills and passions translate from one role or sector to another. Ask direct questions about whether the candidates have had volunteer experience, and if nothing is on the resume, be sure to be specific, asking about town boards, schools, and religious organizations, as well as general volunteering in other nonprofits—these are often overlooked by individuals moving into the sector for the first time.
- **Encourage the candidate to ask questions.** Remember that this is a two-way process, and that candidates may have questions about the role and the organization to help them assess fit. Keep this portion to about a quarter of your time during a one-hour interview and pay attention to the quality of questions, as it can tell you a lot about a candidate.

Evaluating the candidate post interview:

- **Assess each candidate for cultural fit.** 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.
- **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 internal reference checks. The checks you conducted when hiring the employee likely focused on a different set of roles and responsibilities than those encompassed by the new role. Also remember that the person has likely grown and developed since the time he or she left his or her 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 versus the others. Finally, always ask the candidates for the best way to reach them (e.g., phone or email, cell versus 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. If the organization is sharing confidential or proprietary information, it is important to get a non-disclosure agreement signed before doing so. The agreement can be simple and short, but it is a best practice to put confidentiality obligations in writing.

Sample Interview Questions

Sample “beginning” questions:

- Let’s open up with your interest in this role and our organization—tell me more about that and why you feel your background and experience are uniquely suited to being successful here.
- Having read the job description, where would you see yourself able to “hit the ground running” if you were to be hired?
- Where would you anticipate encountering the steepest learning curve in this job? What skills/ experience do you hope to gain working at our organization?



Sample “track-record” questions:

- Tell me about your current/most recent role at XYZ organization. How big is your team? Budget? How does your work fit into the organization’s overall structure?
- Why did/would you leave [name of most recent or current organization]? (This will help you understand the arc of his or her career and ascertain if the moves make sense. In essence, “did this person really pursue growth in each career move or is he or she on a sideways or downward career spiral?”)

Sample “results” questions:

- What do you see as your top three achievements or legacies in your role at XYZ organization? Why?
- What do you see as your greatest challenges/failures in your role at XYZ organization? Why?
- Describe the role in which you have been least effective. Why?
- Walk me through the best example of (growth, turnaround, etc.) that you led. What did it take?
- Tell me about a time when, because of your analysis, there was a major change of strategy, operations, or key decisions in your organization.
- How do you plan your work? Prioritize your work?
- If your most recent manager had to characterize your strengths and weaknesses, what would he or she say?
- Have you ever been in a situation where the goals were not clearly defined? How comfortable were you? How did you work through this?
- Describe a typical day at your previous (or current) position.

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

- What was the highest performing team in which you worked? What was your role? What was your contribution?
- Give me an example that describes your working style (e.g., probe for independent versus collaborative; deadline-focused versus not, etc.)
- What is different about the way you and your current or previous manager manage people?
- Tell me about the best and worst direct reports you have ever managed. How did you work with them? What do you look for in colleagues you recruit?
- Give me an example of how you have provided professional development opportunities to your team members.
- Give me an example of persuading a colleague or team member to change his or her approach. How did you do it?
- If your most recent manager had to characterize your ability to work in a team, what would he or she say? And those who reported to you?
- How do you give feedback? How do you take feedback? Provide examples.
- What is your leadership style? How has your leadership style evolved over time?

There are also some specific questions appropriate for candidates who are looking to “bridge” from the for-profit to the nonprofit world:

- Tell me more about your volunteer experience and why you think it has prepared you for a full-time nonprofit role.
- What (volunteer-related) results make you proud? How did that work help you refine what you're now looking for in a nonprofit role?
- Why do you want to work in the nonprofit sector? What do you think would be different about it compared to your role in the for-profit sector?
- How do your experiences translate to this role at our organization?
- Why does our mission resonate with you?
- How do you define consensus-driven decision making? When have you seen this work? What has been your experience of the complexities of consensus decisions?

Sample “cultural fit” questions:

- What do (or did) you enjoy most and least at your current (or previous) job?
- If we asked your colleagues what they might want to change about you, what do you think they would say?
- What is important to you in a workplace?
- What is your biggest pet peeve in a workplace?
- What qualities do you look for in a manager? In a colleague? In a direct report?

Other questions:

- Where do you see yourself in three to five years?
- If relocation might be necessary, “do you envision any obstacles in relocating?”
- Are you comfortable with the compensation range for this position?
- Is there anything at all that I haven’t asked you that you want to be sure is part of this interview process?

Legal and Illegal Interview Questions

A number of areas are simply off limits when interviewing potential candidates. Here are some guidelines for what you should and shouldn't ask during the interview process.



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? 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.

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 9 a.m.?” is also legal. Also asking about residence in the context of relocation is also legal, for example, “What are the challenges of you relocating for this position?”

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.

Physical Health

- **Unlawful inquiries:** General questions (“Do you have any handicaps?”), which would tend to elicit information about handicaps or health conditions that do not relate reasonably to fitness to perform the job. “Have you ever had any serious illnesses?” or “Do you have any physical disabilities?” or “What is the prognosis of your handicap?”

- **Lawful inquiries:** “Can you lift 40 pounds?” 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.

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 child-care arrangements have you made?”
- **Lawful inquiries:** Whether an 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 a.m.?” are acceptable.

Name

- **Unlawful inquiries:** Any inquiries about names, 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.

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.

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?”

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.

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 United States?” or “Are your parents and/or spouse

citizens of the United States?” or “Are you, your parents, or your spouse naturalized or native-born US citizens?”

- **Lawful inquiries:** Whether an 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 United States?” or “What is your visa status? Are you able to provide proof of employment eligibility upon hire?”

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.

Race or Color

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

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.

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.

Military

- **Unlawful inquiries:** Type or condition of military discharge. An 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.)

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.

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.

We'd like to thank Suzanne King, a partner in the law firm Pierce Atwood LLP, for contributing to this article. Suzanne counsels clients in a broad range of employment practices including hiring, managing employee performance, employment agreements, and more.

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 distinctions 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 contact 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
- **Qualitative data**—tangible examples that allow you to better understand the candidate’s management and communication style, track record, and 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, you should 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.

Confidentiality

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 unnamed references as well as to conduct credit and background checks, and you cannot 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. If you use an outside vendor to conduct background checks, you will need to comply with the Fair Credit Reporting Act.) 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 handwritten 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, [Equal Employment Opportunity Commission 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.

Sample Reference Check Questions

A number of sample questions are listed on the next page. You may also tailor questions to specific areas you'd like to probe about each candidate, or to how he or 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 or her department?
- What are his or 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 or he a visionary? Examples?
- How has he or she been able to increase the visibility of the organization?
- How creative is XX in building resources and diversifying funding? Has he or 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 or he contribute?
- How has XX demonstrated his or 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 or 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 or he inclusive? Fair? Abrupt? Random?
- Other?

Operational effectiveness

- Please describe his or 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 or 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 or 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 or he overcome them? Examples?
- If you were to do an appraisal on XX, what would his or her development objectives be?
- What would you see as the ideal position for him or 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 or her decision?
- Would you hire or work with him or 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?

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., CPAs) 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. The legal requirements related to criminal records checks are complex, and there are serious penalties associated with failure to comply with the applicable legal requirements. It is important to confer with experienced employment counsel to ensure that your background check process is compliant.

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 a 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, bonuses, and coverage of relocation costs. In addition, you should include details about whom 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.

The Offer Letter Template featured on the next page can help get you started.

Offer Letter Template

Date

Name of Candidate

Candidate Address

Dear Candidate:

1. Congratulations and offer extension:

- We are delighted to extend an offer to you for the INSERT POSITION NAME at INSERT 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.

2. Salary and benefits information:

- Salary and terms of payment (e.g., weekly, monthly). To avoid creating an implied guarantee of salary for a year, state the weekly or monthly salary first, and then include the yearly amount, but be sure to add “if annualized ” (e.g., \$5,000 monthly, \$60,000 if annualized).
- Benefits (medical, dental, retirement plans, vacation, etc.).
- Other, if applicable (e.g., relocation expenses, commuting expenses, severance package, other position-specific benefits).

3. 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).

4. Nature of employment (i.e., at-will, contract)

5. I-9 requirements, including documentation that must be provided within the first three days of work

6. If employment is contingent upon successful completion of a background check, or drug test, or reference check, etc., include that information. Be sure to state that the offer of employment is contingent upon the completion of whatever is required.

7. 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.

Managing a New Employee's 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 or her to join relevant professional associations and, if possible, to attend any public events that your organization is sponsoring before the official start date. (Note: There may be an expectation or even requirement that the organization pay for any related costs. This should be addressed at the time the new hire is encouraged to join the organization.) 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 or 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. Of course, it is important to clearly convey to the new hire that he or she should not be performing any work until the start of his or her employment.
- **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 or she begins is imperative. Employees need to know what to expect, and the new leader will benefit from getting a sense

of his or 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, sharing his or her background and 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 or her new 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 or her to prioritize early on, and not to attempt too much right off the bat.

Set Your New Nonprofit CEO Up for Success: Start With an Employment Agreement

You have found your new CEO after a long, arduous process. Your board is looking forward to years of stability and is eager to get the new leader started. But before you begin the onboarding process, do not overlook the value of an employment agreement. It could be the most essential tool for building a successful relationship.



A well-drafted agreement will set expectations for both parties, ensuring that your board and its new CEO are on the same page with respect to the role as well as the terms and conditions of employment. Hammering out the details of the relationship at the outset can help set the new CEO up for success, and it can help build a shared vision for the future of the organization. If things don't work out, an employment agreement can also help make the CEO's departure more orderly.

The employment agreement can help the board flesh out three key areas that will help get the CEO started on the right foot and smooth potential bumps down the road. These areas include:

- Setting expectations for the role
- Spelling out compensation and benefits
- Providing clear steps if the relationship doesn't work out

Setting Expectations

What does the board want the CEO to focus on in the first year? Does the board want to limit the term of the CEO's employment for any reason? What metrics will the board use to measure success? Setting—and documenting—these expectations can be a collaborative act, helping the CEO and board start with a mutual understanding about their respective roles.

For example, a CEO will likely want to know if the contract is for a specified term with an option to renew or an open-ended agreement that provides ongoing employment. Many organizations opt for a specified term with automatic renewal, but agreements also can be for an indefinite period. The board should ensure that, if the agreement is for a specified term, it can be terminated before the end of the term for various reasons, both with and without cause.

The agreement should also include a section that summarizes the CEO's job duties. This doesn't take the place of a more detailed job description but rather conveys in broad strokes the most important aspects of the role. Success in the CEO role often requires an understanding of—and commitment to—what matters to the board. An employment agreement offers an important opportunity to confirm that the board and the CEO are on the same page with respect to how the CEO will spend his or her time. For example, the agreement should spell out whether the board expects the CEO to dig in and work on implementing the new strategic plan, or delegate those duties and focus instead on fundraising, or juggle both of these important responsibilities. By including a summary of the CEO's job duties, both parties reduce the likelihood of misunderstanding the position's priorities. Many agreements also detail how, and how frequently, the CEO's performance will be evaluated. Performance feedback is an important facet to gauging a CEO's success, and the board should be willing to commit to a reasonable process and then follow through with it.

Employment Agreement Must-Haves

A well-drafted employment agreement includes, among other things, the following key provisions:

- Term of the agreement
- CEO duties
- Compensation and benefits
- CEO duties
- Performance evaluation process
- Reasons for termination (death, disability, for cause, without cause, for good reason, by mutual agreement)
- Severance
- Post-employment obligations
- Breach of contract

Benefits and Compensation

The financial aspects of the relationship are obviously a major issue for both the board and the CEO. The agreement should state how much and when the CEO will be paid. In addition, it is important to address the timing of salary increases and whether any increase is tied to a particular performance metric. Also important are details about bonuses the CEO may be eligible for as well as the other components of the total compensation package (i.e., retirement plan, health insurance, short and/or long-term disability benefits, life insurance, housing, education assistance plans, vacation, and other paid time off).

A cautionary note: many nonprofit organizations are subject to significant tax penalties if certain key executives, including the CEO, receive “excess benefits”

from the organization. Excess benefits include compensation that exceeds the fair value of the services rendered. There are important exceptions to these rules as well as a “rebuttable presumption” of reasonableness if the organization, among other things, obtains and relies on comparability data when approving the compensation. These rules are complicated and the consequences for getting this wrong are serious. Therefore, before finalizing the agreement, the board should discuss the compensation package with experienced employment counsel.

Parting Ways

Although it may seem like bad karma to discuss the end of the employment relationship when it is just beginning, there is no better time to sort out the details of an amicable parting than when the CEO and the board are feeling good about the relationship and optimistic about the future.

The agreement should detail the various circumstances that would result in termination (by death or disability, termination by the organization with or without cause, or by the CEO for good reason) as well as what severance benefits the CEO is entitled to upon termination.

Defining the various termination options is a critical component of an employment agreement. Most agreements specify that employment terminates upon death or disability. In addition, agreements typically permit the board to terminate the CEO’s employment for cause. Nonprofit boards can expect to spend some time negotiating the definition of cause—the board will want a fairly broad definition and the CEO will want to ensure that the definition is narrow. For example, employment agreements often include in the definition of cause most criminal convictions, even if the criminal offense relates to off-duty conduct. The agreement also should include a provision for the board to terminate the CEO’s employment without cause, just in case the board decides to move in a different direction even if the CEO has not engaged in any misconduct. Many agreements have a fairly narrow definition of cause and a broad “without cause” provision. Finally, CEOs generally want to include a termination provision triggered by the CEO for “good reason,” such as if the CEO’s job duties change significantly or compensation decreases.

In addition to defining the various termination options, the agreement should also detail whether termination requires notice and, if required, how much. Notice is an important safeguard for both the CEO and the organization, increasing the possibility of a smooth transition. Most employment agreements require 30 or 60 days’ notice. Typically, the CEO will continue to be paid during the notice period, whether or not the board expects the CEO to continue to work through the notice period. It is important for the agreement to spell out that the CEO can be relieved of duty during the notice period at the discretion of the board.

Most agreements provide for severance in the event the CEO is involuntarily terminated without cause or elects to resign with good reason. This soft landing

in the event the relationship is not successful is important protection for the CEO. It is much less common to see severance offered in the event of a termination for cause or a voluntary resignation without a good reason. If severance is offered in any circumstance, the agreement should explicitly state that the CEO must sign a standard release agreement (under which legal claims are waived) in exchange for the severance payment.

In addition to addressing how the employment relationship will end, the agreement should also address post-employment restrictions, if any, such as non-compete or customer non-solicit obligations. While not all CEO agreements include such restrictions, all agreements should include a confidentiality provision that protects the organization's confidential information during and after employment.

Admittedly, it takes time to work through these provisions, but it will be time well spent. Negotiating these details provides an important opportunity for the board and the CEO to start the relationship on the same page. By stating the parameters of success at the beginning of the relationship, an employment agreement can set a critical foundation for arguably the most important relationship in your organization: the one between the board and the CEO.

We'd like to thank Suzanne King, a partner in the law firm Pierce Atwood LLP, for contributing this article to the toolkit. Suzanne counsels clients in a broad range of employment practices including hiring, managing employee performance, employment agreements, and more.

Appendix: Sample Nonprofit Job Descriptions

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.

Whether you're seeking a senior position in a nonprofit, recruiting for new nonprofit leaders, or exploring the responsibilities of key nonprofit positions, the examples shared here can help inform your efforts and research. These representative job descriptions cover a variety of roles—including CEO/Executive Director, COO, CFO, development, board member, and others—and illustrate just some of the many ways organizations configure their senior management roles and write their job descriptions for would-be candidates.

CEO/Executive Director/ President Sample Job Descriptions

The two job descriptions that follow represent classic profiles of executive directors/presidents/chief executive officers at organizations with revenues less than \$20 million.

Each sample job description is based on an actual position specification used during a search by a nonprofit organization. We have removed all information that would identify the hiring organization. It is important to note that each of our sample organizations has its own set of idiosyncrasies that have affected the configuration of the CEO position. The job description you develop for your organization should be a blend of both the classic CEO responsibilities and the particular needs of your nonprofit. Each sample job description is intended to be a jumping off point, and likely will need to be tailored to meet the particular needs of your organization. Feel free to use and tailor these descriptions for your needs.

Sample Job Description: Executive Director (Small Organization)

This sample job description shares how one smaller sized, growing, multisite nonprofit organization configured the role of executive director. The executive director is responsible for general management as well as designing a national expansion plan. There also is a heavy emphasis on program evaluation.

Feel free to use and modify this sample job description to help you create one for your organization.

Sample Description

XYZ Nonprofit Executive Director

Reporting to the Board of Directors, the Executive Director (ED) will have overall strategic and operational responsibility for XYZ Nonprofit's staff, programs, expansion, and execution of its mission. She or he will initially develop deep knowledge of field, core programs, operations, and business plans.

Responsibilities

Leadership & Management:

- Ensure ongoing local programmatic excellence, rigorous program evaluation, and consistent quality of finance and administration, fundraising, communications, and systems; recommend timelines and resources needed to achieve the strategic goals.
- Actively engage and energize XYZ Nonprofit volunteers, board members, event committees, alumni, partnering organizations, and funders.
- Develop, maintain, and support a strong Board of Directors; serve as ex-officio of each committee, seek and build board involvement with strategic direction for both ongoing local operations as well as for the national rollout.
- Lead, coach, develop, and retain XYZ Nonprofit's high-performance senior management team. Ensure effective systems to track scaling progress, and regularly evaluate program components, so as to measure successes that can be effectively communicated to the board, funders, and other constituents.

Fundraising & Communications:

- Expand local revenue generating and fundraising activities to support existing program operations and regional expansion while simultaneously retiring building debt.
- Deepen and refine all aspects of communications—from web presence to external relations with the goal of creating a stronger brand.
- Use external presence and relationships to garner new opportunities.

Planning & New Business:

- Design the national expansion and complete the strategic business-planning process for the program expansion into new markets.
- Begin to build partnerships in new markets, establishing relationships with the funders, and political and community leaders at each expansion site.
- Be an external local and national presence that publishes and communicates program results with an emphasis on the successes of the local program as a model for regional and national replication.

Qualifications

The ED will be thoroughly committed to XYZ Nonprofit's mission. All candidates should have proven leadership, coaching, and relationship management experience.

Specific requirements include:

- Advanced degree, ideally an MBA, with at least 10 years of senior management experience; track record of effectively leading and regionally and/or nationally scaling a performance- and outcomes-based organization and staff; ability to point to specific examples of having developed and operationalized strategies that have taken an organization to the next stage of growth
- Unwavering commitment to quality programs and data-driven program evaluation
- Excellence in organizational management with the ability to coach staff, manage and develop high-performance teams, set and achieve strategic objectives, and manage a budget
- Past success working with a Board of Directors with the ability to cultivate existing board member relationships
- Strong marketing, public relations, and fundraising experience with the ability to engage a wide range of stakeholders and cultures
- Strong written and verbal communication skills; a persuasive and passionate communicator with excellent interpersonal and multidisciplinary project skills
- Action-oriented, entrepreneurial, adaptable, and innovative approach to business planning
- Ability to work effectively in collaboration with diverse groups of people
- Passion, idealism, integrity, positive attitude, mission-driven, and self-directed

Sample Job Description: President (Medium Organization)

This sample job description shares how one medium-sized nonprofit organization configured its president role. The president focuses on the core functions of the organization to enable it to achieve its long-term vision. Areas of focus include: strategy, finance, board management, fundraising, and program delivery.

Feel free to use and modify this sample job description to help you create one for your organization.

Sample Description

XYZ Nonprofit President

The President, a newly created position, will report into the Founder and work collaboratively with the Board of Directors in leading the transformation of XYZ Nonprofit from its current stage to a more mature organization capable of delivering on its long term vision. Specifically, she or he will ensure that XYZ Nonprofit's fiscal, operations, fundraising, marketing, human resource, technology, and programmatic strategies are effectively implemented across all segments of the organization.

Responsibilities

Strategic vision and leadership

- Collaborate with the founder and the board to refine and implement the strategic plan while ensuring that the budget, staff, and priorities are aligned with XYZ Nonprofit's core mission.
- Provide inspirational leadership and direction to all executives, and ensure the continued development and management of a professional and efficient organization; establish effective decision-making processes that will enable XYZ Nonprofit to achieve its long- and short-term goals and objectives.
- Cultivate a strong and transparent working relationship with the Board and ensure open communication about the measurement of financial, programmatic, and impact performance against stated milestones and goals.
- In partnership with the Founder, help build a diverse and inclusive Board representative of the community that is highly engaged and willing to leverage and secure resources.

Development

- Ensure that the flow of funds permits XYZ Nonprofit to make continuous progress towards the achievement of its mission and that those funds are allocated properly to reflect present needs and future potential.
- Formulate and execute comprehensive marketing, branding and development strategies that will ensure consistency throughout the organization and enhance revenue from major donors, foundations, government agencies, and corporations.

Strengthening infrastructure and operations

- Ensure the delivery of high-quality services while managing for current and future growth.
- Support and motivate the organization's staff.
- Facilitate cross-departmental collaboration and strengthen internal communications with staff throughout the organization; create and promote a positive, multicultural work environment that supports consistency throughout the organization's strategy, operational methods, and data collection needs.
- Oversee the financial status of the organization including developing long and short range financial plans, monitoring the budget and ensuring sound financial controls are in place; set financial priorities accurately to ensure the organization is operating in a manner that supports the needs of the program and staff.

Program Development

- Rationalize the delivery of programs through new and existing offices and partnerships.
- Increase efficiencies and consistency throughout the organization by developing and implementing standardized programs, services, and program office marketing.

Qualifications

- Minimum of a BA, ideally with an MBA, MPA, or related advanced degree
- At least 15-20 years of overall professional experience
- Prior nonprofit experience ideal; management of a global or multisite organization preferred
- Significant board development, fundraising, marketing/branding, and fiscal management experience a must
- A financially savvy and politically astute leader with the ability to set clear priorities, delegate, and guide investment in people and systems; keen analytic, organization and problem solving skills, which support and enable sound decision making

- Excellent coalition building skills with an ability to communicate and work effectively with a variety of internal and external stakeholders; a persuasive negotiator able to achieve consensus amongst differing opinions
- Outstanding presentation and communication skills, and the experience and proclivity to be an outgoing spokesperson, relationship builder, and fundraiser
- Strong commitment to the professional development of staff; successful track record of recruiting and retaining a diverse team

Chief Financial Officer and Finance Sample Job Descriptions

Chief financial officer (CFO) roles—and the organizational structures in which CFOs operate—vary significantly across organizations. Based on Bridgespan’s experience and interviews, the organization’s budget size and the complexity of its programs and revenue sources drive how the CFO role is configured—and how the role evolves over time.

The sample job descriptions posted here show how organizations may configure the CFO role based on budget size and complexity of funding and programming. As reflected in these samples, requirements for CFOs tend to be broad. However, every organization needs to determine which requirements it absolutely must have and which requirements would be nice to have. By setting these hiring goals in advance, your organization can hone in on the applicants with the must-have requirements and can also start thinking about how to compensate for the qualifications that a star candidate may lack.

Each sample job description is based on an actual position specification used during a search by a nonprofit organization. We have removed all information that would identify the hiring organization. It is important to note that each of our sample organizations has its own set of idiosyncrasies that have affected the configuration of that CFO position. The CFO job description you develop for your organization should be a blend of both the classic CFO responsibilities and the particular needs of your nonprofit. Each sample job description is intended to be a jumping off point, and likely will need to be tailored to meet the particular needs of your organization. Feel free to use and tailor these descriptions for your needs.

Sample Job Description: Chief Financial Officer (Complex Funding)

Medium organization—budget between \$10 million and \$40 million—with relatively complex funding.

In this sample job description, the nonprofit organization has complex program offerings and diverse financing sources—such as state and federal funding in addition to private funding. There is a heavy emphasis on reporting, requiring the CFO to focus narrowly on the finance function. Knowledge and understanding of Office of Management and Budget requirements for nonprofits is critical.

Feel free to use and modify this sample job description to help you create one for your organization.

Sample Description

XYZ Nonprofit
Chief Financial Officer

Organization

The mission of XYZ Nonprofit is...

XYZ Nonprofit serves more than X people annually and has a budget of more than \$Y million. Please visit www.XYZnonprofit.org to learn more. Position
The chief financial officer (CFO) is responsible for all financial matters of XYZ Nonprofit and its affiliate organizations. The CFO will report to and work closely with the executive director. In addition, she or he will partner with the senior leadership and the board of directors to develop and implement strategies across the organization. The CFO will oversee all compliance and recognition for government (federal and state) contracts and private grants. She or he must be able to adapt to a continually evolving environment and thrive in an autonomous and deadline-oriented workplace while managing a finance staff of four.

Specific responsibilities include:

Finance

- Oversee cash flow planning and ensure availability of funds as needed.
- Oversee cash, investment, and asset management.
- Oversee financing strategies and activities, as well as banking relationships.
- Develop and utilize forward-looking, predictive models and activity-based financial analyses to provide insight into the organization's operations and business plans.

Planning, Policy, and Investor Relations

- Coordinate the development and monitoring of budgets.
- Develop financial business plans and forecasts.
- Participate in corporate policy development as a member of the senior management team.
- Engage the finance committee of the board of directors to develop short-, medium-, and long-term financial plans and projections.
- Represent the company to financial partners, including financial institutions, investors, foundation executives, auditors, public officials, etc.
- Remain up to date on nonprofit audit best practices and state and federal law regarding nonprofit operations.

Accounting and Administration

- Oversee the accounting department to ensure proper maintenance of all accounting systems and function; supervise XYZ Nonprofit's finance staff.
- Ensure maintenance of appropriate internal controls and financial procedures.
- Ensure timeliness, accuracy, and usefulness of financial and management reporting for federal and state funders, foundations, and XYZ Nonprofit's board of directors; oversee the preparation and communication of monthly and annual financial statements.
- Coordinate audits and proper filing of tax returns.
- Ensure legal and regulatory compliance regarding all financial functions.

Qualifications

The CFO will be a seasoned and mature leader with at least 12-15 years of broad finance experience, ideally beginning in audit, followed by experience gathering and evaluating financial information and making actionable recommendations to senior leadership. She or he will ideally have experience managing finance (accounting, budgeting, control, and reporting) for a complex nonprofit with multiple funding sources including government (federal and state) contracts and an affiliate structure with diverse program areas delivered nationally.

The CFO will have the following experience and attributes:

- A minimum of a BS; a CPA and/or MBA would be a plus.
- At least five years experience as CFO or equivalent, preferably in a nonprofit organization with a budget of at least \$10 million.
- Experience in a senior financial-management role, partnering with executive staff, resulting in the development and implementation of creative financial management strategies.
- Significant experience in or knowledge of nonprofit accounting, including sophisticated fund and grant accounting, compliance, and reporting.
- Deep knowledge and understanding of the Office of Management and Budget Circular A133 audit.
- Experience working with information technology staff to manage finance and accounting software packages.
- Excellent written and oral communication skills.
- Demonstrated leadership ability, team management, and interpersonal skills.
- Excellent analytical and abstract reasoning skills, plus excellent organization skills.

Sample Job Description: Chief Financial Officer (Small Organization)

Small organization—budget between \$1.5 million and \$10 million

In this sample job description, the nonprofit CFO (noted below as the Director of Finance and Administration) wears several hats. The budget can't support specialized staff, so the CFO is responsible for a variety of areas far removed from the finance and administrative functions. These include human resources, information technology, legal, and facilities—and even building relationships with program recipients.

Feel free to use and modify this sample job description to help you create one for your organization.

Sample Description

345 Nonprofit
Director of Finance and Administration

Organization

The mission of 345 Nonprofit is...

345 Nonprofit currently serves X people annually with a budget of \$Y million.

Please visit www.345nonprofit.org to learn more.

Position

Reporting to the executive director (ED), the director of finance and administration will define the process and implement the infrastructure/systems needed to support substantial growth over the next five to 10 years. She or he will continue to build and manage effective and streamlined administrative/financial systems, including financial, accounting, legal, information technology (IT), human resources (HR), and physical infrastructure.

As a member of the senior management team, the director will be involved in strategic planning, evaluation, and professional development initiatives, as well as planning for 345 Nonprofit's expansion to multiple new sites both locally

and in other cities. In keeping with 345 Nonprofit's values, the director will also interact with program recipients as a mentor.

Specific responsibilities include:

Financial Management

- Review and approve preparation and finalization of monthly and annual financial reporting materials and metrics for 345 Nonprofit's board of directors.
- Oversee budgeting, financial forecasting, and cash flow for administration, existing programs, and proposed new sites.
- Manage one full-time accounting administrator; hire and retain support staff as needed in the future.
- Coordinate all audit activities.

Administrative Leadership and Management

- Serve as a business partner to the ED on the organization's financial, budgeting, and administrative processes—including HR, payroll, and benefits functions—with an eye to continuously developing and improving systems.
- Lead 345 Nonprofit's technical staff to design an IT plan for the future, and implement it successfully to meet IT needs (hardware and software) as the organization grows.
- Manage the organization's physical infrastructure, physical plant, and system maintenance (phone system, security, cleaning, supplies, etc.), with assistance from two office managers.

Program Recipient Mentoring

- Develop successful and trusting relationships with the program recipients and create and sustain an environment at 345 Nonprofit that supports these relationships.
- Teach/facilitate classroom activity approximately three hours per week, and serve as an advisor for approximately five program recipients (required of all 345 Nonprofit staff).

Qualifications

The director of finance and administration will have at least five to eight years of professional experience, including managing the finance and administration of a high-growth \$10 million to \$20 million organization (preference given to nonprofit experience). She or he will have experience creating and driving the analytic framework for planning and managing organizational change in a highly entrepreneurial organization.

The director of finance and administration will have the following experience and attributes:

- Bachelor's degree (MA/MBA preferred) in Business, Management, or Finance
- Excellent people skills, with experience collaborating in a multidisciplinary, diverse, and dynamic team
- Demonstrated experience in financial management and accounting, ideally in the nonprofit sector
- Experience should include legal, audit, compliance, budget, and resource development
- Demonstrated resourcefulness in setting priorities, proposing new ways of creating efficiencies, and guiding investment in people and systems
- Proven effectiveness leading professionals in finance and accounting.
- Technologically savvy, with an ability to point to examples of having worked with IT staff to develop and implement new processes and systems that increased efficiency in a fast-moving environment
- Flexible and a self-starter; able to multitask while also being highly detail-oriented
- Personal qualities of integrity, credibility, and a commitment to 345 Nonprofit's mission.

Sample Job Description: Chief Financial Officer (Medium Organization– Straightforward Financing)

Medium organization—budget between \$10 million and \$40 million—with relatively straightforward financing

In this sample job description for a nonprofit chief financial officer, the organization has fairly simple programs and revenue sources. Reporting requirements are less complicated, enabling the CFO to take responsibility for a broader span of functional areas.

Feel free to use and modify this sample job description to help you create one for your organization.

Sample Description

123 Nonprofit
Chief Financial Officer

Organization

The mission of 123 Nonprofit is...

123 Nonprofit serves more than X people nationally each year and has a budget of \$Y million.

Please visit www.123nonprofit.org to learn more.

Position

Reporting to and partnering with the president, the chief financial officer (CFO) will set 123 Nonprofit's financial policy and direction while also being an active participant in, and driver of, the organization's overall strategy. She or he will lead all financial administration, business planning, and budgeting. As a member of the senior leadership team, the CFO will work closely with a motivated and engaged finance and governance committee of the board of directors.

The CFO will lead 123 Nonprofit's finance, human resources (HR), and information technology (IT) staff.

Specific responsibilities include:

Strategy

- Partner with the president on all operational and strategic issues as they arise; provide strategic recommendations to the president based on financial analysis and projections, cost identification and allocation, and revenue/expense analysis.
- Participate in the ongoing strategic planning process as an integral member of the senior management team.
- Oversee long-term budgetary planning and cost management in alignment with 123's strategic plan.
- Engage the vice president (VP) of development to align financial management with short- and long-term financial planning and projections.
- Engage the board finance committee around issues, trends, and changes in the operating model and operational delivery.

Financial and Operational Management

- Oversee budgeting, and the implementation of budgets, so as to monitor progress and present operational metrics both internally and externally.
- Ensure that finance staff maintains financial record systems in accordance with Generally Accepted Accounting Principles, and monitor the use of all funds.
- Oversee the preparation and approval of all financial reporting materials and metrics for funding organizations and 123 Nonprofit's board of directors; prepare and communicate monthly and annual financial statements.
- Manage cash flow and forecasting; direct all financial, project-based, and departmental accounting.
- Coordinate all audit activities.
- Evaluate and oversee all benefits negotiations, thus providing the most competitive packages for 123 Nonprofit employees.
- Review all formal finance-, HR-, and IT-related procedures, processes, and administration, recommending improvements to the systems in place and managing the systems going forward.

Team Management

- Develop and manage direct staff, to include managers in finance, HR, and IT; guide larger multidisciplinary teams outside of direct span of control.
- Engage other members of the senior management team—VP for research, evaluation, and training; VP of communications; VP of field operations; and VP of development—to facilitate cross-department collaboration that ensures that all financial, IT, and HR solutions positively support 123's evolving strategy, operational delivery, and data collection needs.
- Provide guidance on attracting and developing key national team members for 123 Nonprofit.

Qualifications

The CFO will be a seasoned and mature leader with at least 12-15 years of broad finance experience, ideally beginning in audit, followed by experience gathering and evaluating financial information and making actionable recommendations to senior leadership. She or he will ideally have experience managing finance (accounting, budgeting, control, and reporting), HR, and IT for a national nonprofit.

The CFO will have the following experience and attributes:

- A minimum of a BS and CPA/CMA; an MBA would be a plus
- Mature and proactive, with evidence of having worked as a true business partner to the chief executive of a multistate and network-based entity. If coming from the for-profit world, nonprofit board experience preferred
- Demonstrated excellence in managing finance, accounting, budgeting, control, and reporting
- Skill in examining, developing, reengineering, and recommending financial, HR, and technology policies and procedures
- Strong analytical skills and experience interpreting a strategic vision into an operational model
- A collaborative and flexible style, with a strong service mentality. Needs to be seen as a team player who is committed to lifelong learning
- A hands-on manager with integrity and a desire to work in a dynamic, mission-driven environment
- An effective communicator, with strong oral and written skills
- Strong commitment to developing team members
- Demonstrated commitment to the social sector with a passion for the organization's mission is essential

Sample Job Description: Chief Financial Officer (Large Organization)

Large organization—budget greater than \$40 million

In this model, the organization runs programs nationally and has complex funding sources. The CFO focuses strictly on finance, accounting, and the investment activities of the organization. In this sample, the CFO has a senior, seasoned staff with deep experience in nonprofit finance.

Feel free to use and modify this sample job description to help you create one for your organization.

Sample Description

ABC National Nonprofit
Chief Financial Officer

Organization

The mission of ABC National Nonprofit is...

ABC National Nonprofit serves more than X people each year and has a budget of \$Y million.

Please visit www.ABCNationalNonprofit.org to learn more.

Position

Reporting to and partnering with the chief executive officer (CEO), the chief financial officer (CFO) will play a critical role in developing and implementing the national strategy for ABC National Nonprofit. As a member of the senior leadership team, the CFO will be an advisor to the divisional presidents, evaluating and assisting them with their financial plans and economic modeling. S/he will be responsible for overseeing all fiscal and fiduciary responsibilities for the organization, in conjunction with the board of directors and the finance, audit, and investment committees of the board.

Specific responsibilities include:

Strategy

- As a true business partner to the CEO and divisional presidents, assess organizational performance against both the annual budget and ABC's long-term strategy. Develop tools and systems to provide critical financial and operational information to the CEO and make actionable recommendations on both strategy and operations.
- Engage the board finance, audit, and investment committees around issues, trends, and changes in the operating model(s) and operational delivery. Assist in establishing yearly objectives and meeting agendas, and selecting and engaging outside consultants (auditors, investment advisors).
- Oversee long-term budgetary planning and costs management in alignment with ABC National Nonprofit's strategic plan, especially as the organization considers sponsorships, potential acquisitions, and collaborations with external organizations.

Financial and Operational Management

- Oversee all accounts, ledgers, and reporting systems, ensuring compliance with appropriate Generally Accepted Accounting Principles, regulatory requirements, and Office of Management and Budget audit requirements. Maintain internal control safeguards and coordinate all audit activities.
- Partner with the vice president of information technology (IT) to procure specialized finance IT systems that meet the needs of the organization.
- Manage cash flow and forecasting. Develop a reliable cash flow projection process and reporting mechanism that includes minimum cash threshold to meet operating needs. Optimize the handling of banking relationships and initiate appropriate strategies to enhance cash positions.
- Oversee budgeting and the implementation of budgets so as to monitor progress and present financial metrics both internally and externally.
- Manage and track the performance of ABC National Nonprofit's endowment in keeping with the policies and investment guidelines established by the investment committee.

Team Management

- Mentor and develop a direct team of four, managing work allocation, training, problem resolution, performance evaluation, and the building of an effective team dynamic.
- Guide larger, cross-divisional teams outside of direct span of control within the five main ABC National Nonprofit program areas.

Qualifications

The CFO will be a seasoned and mature leader with at least 12-15 years of broad finance experience, ideally beginning in accounting, followed by experience gathering and evaluating financial information and making actionable recommendations to senior leadership. S/he will have experience managing the finance function (accounting, budgeting, control, and reporting) within a diverse, division-based entity.

The CFO will have the following experience and attributes:

- A minimum of a BS; MBA preferred; a CPA would be a plus.
- Demonstrable passion for ABC National Nonprofit's mission; a hands-on manager with integrity and a desire to work in a dynamic environment.
- Mature and proactive, with evidence of having worked as a true business partner to the CEO of a multi-divisional organization. If coming from the for-profit world, nonprofit board experience is preferred.
- Strong analytical skills and experience interpreting a strategic vision into an operational model.
- Deep understanding of and experience with Office of Management and Budget audits.
- Past experience successfully partnering with IT staff to manage critical financial management systems.
- An effective communicator at all levels in the organization, with strong oral and written skills and a willingness to share information.
- A collaborative and flexible style, with a strong service mentality.
- Creativity, with experience funding activities in ways that both cover costs and generate operating margins.

Sample Job Description: Controller

In this sample job description, the organization has complex program offerings and diverse funding sources, including state, federal, corporate, and foundation funding. There is a heavy emphasis on reporting, requiring this role to focus narrowly on the finance function. Knowledge and understanding of Office of Management and Budget requirements for this role is critical because of federal funding, as is the ability to work closely with program leaders. Strong team management experience is key to being successful in this role.

Feel free to use and modify this sample job description to help you create one for your organization.

Sample Description

XYZ Nonprofit Controller

Reporting to the chief financial officer (CFO), the Controller will be responsible for oversight of all finance, accounting and reporting activities. As the number-two executive to the CFO, the Controller will be involved in supporting presentations to the board finance and audit committee and will work closely with the senior leadership team.

The Controller will lead all day-to-day finance operations of a budget of \$3 million and supervise a team of X staff members including functional responsibility over accounting, accounts payable, accounts receivable, payroll, and grants administration. The Controller will ensure that XYZ Nonprofit has the systems and procedures in place to support effective program implementation and conduct flawless audits. The Controller will work closely with program leaders and their staffs, not only to educate them regarding finance and accounting procedures but also to explore how the finance function can support program operations.

In addition, she or he will partner with the CFO, senior leadership, and the human resources (HR) and information technology (IT) staff to enhance and better integrate finance, HR, and IT functions.

Responsibilities

Finance and Accounting Leadership

- Oversee all accounts, ledgers, and reporting systems ensuring compliance with appropriate GAAP standards and regulatory requirements.
- Maintain internal control and safeguards for receipt of revenue, costs, and program budgets and actual expenditures.
- Coordinate all audit activity.
- Consistently analyze financial data and present financial reports in an accurate and timely manner; clearly communicate monthly, quarterly, and annual financial statements; monitor progress and changes and keep senior leadership abreast of XYZ Nonprofit's financial status.
- Assist XYZ Nonprofit's leadership in the annual budgeting and planning process; administer and review all financial plans and compare to actual results with a view to identify, explain, and correct variances as appropriate.
- Support the CFO in engaging the board's audit and finance committees around issues and trends in financial operating models and delivery.
- Oversee all financial, project/program and grants accounting; ensure that expenditures are consistently aligned with grant and program budgets throughout the grant/fund period; collate financial reporting materials for government, corporate, and foundation grants.
- Manage organizational cash flow forecasting by working in partnership with the program vice presidents; continuously collaborate with program vice presidents to assess the financial efficacy of program operations and establish finance and administrative systems to support program operations.
- Manage and track the performance of invested assets in keeping with policies and investment guidelines.

Team Leadership

- Leverage strengths of the current finance team members, help to clarify roles and responsibilities and develop and implement training programs in order to maximize and reach optimal individual and organizational goals.
- Provide leadership in strengthening internal communications with staff at all levels throughout the organization; create and promote a positive and supportive work environment.

Qualifications

This is an extraordinary opportunity for a mature leader with seven to ten years of accounting and finance experience, ideally beginning in accounting and audit, followed by experience gathering, evaluating, presenting and reporting financial information to executive teams and external stakeholders. She or he will ideally have experience in a complex nonprofit that has multiple program.

Specific requirements include:

- Leverage strengths of the current finance team members, help to clarify roles and responsibilities and develop and implement training programs in order to maximize and reach optimal individual and organizational goals.
- Provide leadership in strengthening internal communications with staff at all levels throughout the organization; create and promote a positive and supportive work environment.
- Personal qualities of integrity, credibility, and unwavering commitment to XYZ Nonprofit's mission; a proactive, hands-on strategic thinker who will own, in partnership with the CFO, the responsibility for finance
- Minimum of a BA; CPA and/or MBA preferred
- Solid experience coordinating audit activities and managing reporting, budget development and analysis, accounts payable and receivable, general ledger, payroll, and accounting for investments
- A track record in grants management as it relates to compliance and reporting of government, corporate and foundation grants is essential
- Technology savvy with experience selecting and overseeing software installations and managing relationships with software vendors; advanced knowledge of accounting and reporting software
- Commitment to recruiting, mentoring, training, and retaining a diverse team; the foresight and ability to delegate accordingly
- Keen analytic, organization and problem solving skills which allows for strategic data interpretation versus. simple reporting
- Strong interpersonal and communication skills; experience in effectively communicating key data, including presentations to senior management, board or other outside partners
- Ability and desire to translate complex financial concepts to individuals at all levels including finance and non-finance managers

Sample Job Description: National Controller

This organization has complex program offerings and diverse funding sources, including state, federal, corporate, and foundation funding. There is a heavy emphasis on reporting, requiring this role to focus narrowly on the finance function. Knowledge and understanding of Office of Management and Budget requirements for this role is critical because of federal funding, as is the ability to work closely with program leaders. Strong team management experience is key to being successful in this role.

Feel free to use and modify this sample job description to help you create one for your organization.

Sample Description

XYZ Nonprofit National Controller

Reporting to the chief financial officer, the National Controller will lead all day-to-day operations of the finance department, including budget development and analysis, accounting for investments, accounts payable and receivable, general ledger, payroll, relationship management with banks and other vendors, and audit preparation. The National Controller will collaborate with a variety of internal constituents, including the CEO, CFO, program controllers, and department heads.

The National Controller will be charged with identifying new opportunities to improve efficiencies, eliminate backlogs, and respond proactively to other departments needs. She or he will need to analyze the existing processes and systems and work closely with the CFO and administrators to streamline current systems, leverage new information technology, and establish standard operating procedures that provide maximum benefit to all parties involved.

This is an outstanding opportunity for a proactive, hands-on finance manager who brings a successful track record of creative problem-solving and strengthening infrastructure to work in a mission-driven organization.

Responsibilities

Strategic Financial Management

- Manage all accounts, ledgers, and reporting systems ensuring compliance with appropriate GAAP standards and regulatory requirements. Maintain internal control safeguards for the receipt of revenue, costs and both division budgets and actual expenditures.
- Oversee budgeting, and the implementation of budgets, so as to monitor progress and present financial metrics both internally and externally.
- Collaborate with members of the leadership team in drafting, reviewing, and verifying accuracy of annual HQ budgets by department.
- Implement consistent accounting policies, practices, and procedures across all programs.
- Manage cash flow and forecasting for all of XYZ Nonprofit.
- Optimize the handling of banking relationships and initiate appropriate strategies to enhance cash positions.
- Account for and track the performance of XYZ Nonprofit's endowment in keeping with the policies and investment guidelines established by the investment committee.
- Coordinate all audit activities.

Team Leadership

- Provide the necessary training and development for staff.
- Manage work load issues effectively to create a workplace that increases staff retention, and strengthens communication within and outside the department.

Qualifications

- Prior nonprofit finance experience with a successful track record in a senior financial management role for at least 10-plus years is essential
- Demonstrable experience in creating and driving the analytic framework for planning and managing organizational change; ability to anticipate the infrastructure and systems needs in a complex, national, multisite nonprofit
- Exceptional management skills
- Recognized success in developing and monitoring systems to manage both internal operations and programmatic work that involve high levels of collaboration, particularly with program directors and other senior leadership
- An accessible, visible, and flexible management style that inspires trust and confidence in staff to work hard and well together

- Keen analytic, organization, and problem solving skills that support and enable sound decision making in a complex organization; demonstrated resourcefulness in setting priorities and guiding investment in people and systems
- Direct and concise communication skills; active listener; ability to translate complex financial concepts to individuals at all levels including finance and non-finance managers
- Technology savvy with the ability to manage data for financial reporting quickly and effectively
- Personal qualities of integrity and credibility, and a commitment to the mission of XYZ Nonprofit

Sample Job Description: Director of Finance and Administration (Small Organization)

Small organization—budget less than \$3 million

In this model, the director of finance and administration wears multiple hats. The budget can't support specialized staff, so this position is responsible for a variety of areas far removed from the finance and administrative functions. These include human resources, information technology, legal, and facilities—and even building relationships with program recipients.

Feel free to use and modify this sample job description to help you create one for your organization.

Sample Description

XYZ Nonprofit

Director of Finance and Administration

Organization

Founded in 1990, XYZ Nonprofit's mission is...

We do this by...

For more information, please visit www.XYZnonprofit.org.

Position

The Director of Finance and Administration will be a strategic thought-partner, and report to the executive director (ED). The successful candidate will be a hands-on and participative manager and will lead and develop an internal team to support the following areas: finance, business planning and budgeting, human resources, administration, and IT.

The Director of Finance and Administration will play a critical role in partnering with the senior leadership team in strategic decision making and operations as XYZ Nonprofit continues to enhance its quality programming and build capacity. This is a tremendous opportunity for a finance and operations leader to maximize and strengthen the internal capacity of a well-respected, high-impact organization.

Responsibilities

Financial Management

- Analyze and present financial reports in an accurate and timely manner; clearly communicate monthly and annual financial statements; collate financial reporting materials for all donor segments, and oversee all financial, project/ program and grants accounting.
- Coordinate and lead the annual audit process, liaise with external auditors and the finance committee of the board of directors; assess any changes necessary.
- Oversee and lead annual budgeting and planning process in conjunction with the ED; administer and review all financial plans and budgets; monitor progress and changes, and keep senior leadership team abreast of the organization's financial status.
- Manage organizational cash flow and forecasting.
- Implement a robust contracts management and financial management/ reporting system; ensure that the contract billing and collection schedule is adhered to and that financial data and cash flow are steady and support operational requirements.
- Update and implement all necessary business policies and accounting practices; improve the finance department's overall policy and procedure manual.
- Effectively communicate and present the critical financial matters to the board of directors.

Human Resources, Technology and Administration

- Further develop XYZ Nonprofit's human resources and administration, enhancing professional development, compensation and benefits, performance evaluation, training, and recruiting.
- Ensure that recruiting processes are consistent and streamlined.
- Establish and manage a comprehensive training program to educate employees regarding staff tools, policies, and procedures.
- Work closely and transparently with all external partners including third-party vendors and consultants.
- Oversee administrative functions as well as facilities to ensure efficient and consistent operations as the organization scales.

Qualifications

- Minimum of a BA, ideally with an MBA/CPA or related degree
- At least 7-10 years of overall professional experience; ideally six-plus years of broad financial and operations management experience

- The ideal candidate has experience of final responsibility for the quality and content of all financial data, reporting and audit coordination for either a division or significant program area, and has preferably overseen a human resources function previously
- Ability to translate financial concepts to—and to effectively collaborate with—programmatic and fundraising colleagues who do not necessarily have finance backgrounds
- A track record in grants management
- Technology savvy with experience selecting and overseeing software installations and managing relationships with software vendors; knowledge of accounting and reporting software
- Commitment to training programs that maximize individual and organization, goals across the organization including best practices in human resources activities
- A successful track record in setting priorities; keen analytic, organization and problem-solving skills that support and enable sound decision making
- Excellent communication and relationship building skills with an ability to prioritize, negotiate, and work with a variety of internal and external stakeholders
- A multitasker with the ability to wear many hats in a fast-paced environment
- Personal qualities of integrity, credibility, and dedication to the mission of XYZ Nonprofit

Sample Job Description: Managing Director, Finance and Administration

In this model, the organization has fairly simple programs and revenue sources. Reporting requirements are less complicated, enabling this role to take responsibility for a broader span of functional areas.

Feel free to use and modify this sample job description to help you create one for your organization.

Sample Description

Reporting to the executive director (ED), the Managing Director of Finance and Administration will implement the infrastructure and systems needed to support strategic objectives. She or he will be responsible for the oversight of administrative and financial systems including finance, accounting, information technology, human resources, communications, teacher recruiting, and physical infrastructure. As a member of the senior management team, the Managing Director of Finance and Administration will be involved in a range of strategic planning and internal initiatives.

She or he will work closely with the ED and the senior management team in developing XYZ Nonprofit's strategic plan. The Managing Director of Finance and Administration will act as the primary liaison to the board of directors' finance committee, working closely with the committee to strengthen XYZ Nonprofit's financial position and other items as required. She or he will continually evaluate best industry practices in comparison to internal systems and needed resources, with an eye toward both future needs and budget realities.

This executive will have direct management responsibility for a staff of six, which includes a business manager, director of recruiting, and the director of communications.

Responsibilities

Finance and Budgeting

The Managing Director of Finance and Administration will have overall financial management responsibility including the review and approval of monthly, quarterly, and annual financial reporting materials and metrics for the ED and board of directors. She or he will oversee budgeting, financial forecasting, cash flow and coordination of audit activities as well as accounts payable and receivable. The

ideal candidate will not only be able to reconcile financial activities but should also be skilled at capturing key data and processes in order to demonstrate the relationship between XYZ Nonprofit's goals and resulting fundraising needs.

Administration/Operations

The executive will serve as a partner to the ED on the organization's administrative and operational processes, with a goal of continuously developing and improving systems. She or he must evaluate and improve XYZ Nonprofit's information technology infrastructure, implementing new technologies to support key capabilities as required for future growth, and to support and drive key human resource initiatives.

In addition, she or he will have overall responsibility for recruitment of staff. This will include marketing, operations and management of this process. The Managing Director of Finance and Administration will also partner with ED and the rest of the management team to ensure that the focus remain on the organization's mission while maintaining the culture that makes XYZ Nonprofit unique.

Qualifications

The Managing Director of Finance and Administration will have at least 10-plus years of experience, with at least five years managing the finance and administration of a \$5 million to \$10 million organization or business unit. The successful candidate will have experience leading planning efforts and running operationally effective organizations that have multiple functional areas. The Managing Director of Finance and Administration must harness technology solutions in order to more quickly and efficiently communicate resources needed for key activities and performance against plans. Working knowledge of public education would be helpful, but not mandatory. Nonprofit experience is a plus, with a strong preference for someone who has operated in a fast growing environment that has limited budgets and resources.

Specific requirements include:

- Demonstrated experience in financial management and accounting
- Experience with audit, legal compliance, and budget development
- Organization development, human resources management experience
- General management skills
- Proven effectiveness managing others, empowering them to make decisions
- Technologically savvy, with experience overseeing information technology staff or vendors
- Experience effectively communicating key data, including presentations to senior management, the Board or other outside partners/influencers/clients
- Success seeing beyond the numbers, identifying trends and new possibilities
- Bachelor's degree required, advanced degree and/or CPA preferred

Personal Characteristics

- Excellent interpersonal and team skills, extremely collegial
- Outstanding communications skills, written and oral
- Demonstrated resourcefulness and good judgment
- Hands-on, leads by example
- Values diversity of thought, backgrounds and perspectives
- Ability to multitask while maintaining vigilant attention to details
- Integrity/ethics beyond reproach
- Constantly looking to apply best practices
- Predisposition to mentor and subsequently increase responsibilities as team develops
- Connection to XYZ Nonprofit's mission

Chief Operating Officer Sample Job Descriptions

Chief Operating Officer (COO) roles—and the organizational structures in which COOs operate—are highly varied across organizations and even within organizations over time. The way a COO’s responsibilities are defined differs significantly depending on the organization’s strategic imperatives, design, history, and culture, as well as the strengths and weaknesses of the executive director, COO, and other key leaders. Nevertheless, most COO positions can be categorized under one of four basic models, and the sample job descriptions posted here correspond to these models.

Each sample job description is intended to be a jumping off point, and likely will need to be tailored to meet the particular needs of your organization. Feel free to use and tailor these descriptions for your needs.

Sample Job Description: Chief Operating Officer (Operations/Administration)

In this sample job description, the nonprofit chief operating officer (COO) (noted below as the Vice President, Finance and Operations) oversees the functions that support the programs but does not relate directly to program participants, and other senior managers are responsible for the programs themselves.

Feel free to use and modify this sample job description to help you create one for your organization.

Sample Description

XYZ Nonprofit
Vice President, Finance and Operations

Organization

Founded in 1990, XYZ Nonprofit's mission is...

We do this by...

For more information, please visit www.XYZnonprofit.org.

Position

Reporting to the president and serving as an integral member of the senior management team, the Vice President of Finance and Operations (VP) will be responsible for the development of XYZ Nonprofit's financial management strategy and contribute to the development of the organization's strategic goals. In addition to the strategic components, the VP will be charged with developing and implementing more sophisticated policies and procedures both in the finance and general operational realms. This is an outstanding opportunity for a finance executive with operational experience and a proven track record of creative problem-solving and change management to join in a high-growth, mission-driven organization.

Responsibilities

Strategy, Vision and Leadership

- Advise the president and other key members of senior management on financial planning, budgeting, cash flow, investment priorities, and policy matters.
- Serve as the management liaison to the board and audit committee; effectively communicate and present critical financial matters at select board of directors and committee meetings.
- Contribute to the development of XYZ Nonprofit's strategic goals and objectives as well as the overall management of the organization.
- Maintain continuous lines of communication, keeping the president informed of all critical issues.
- Represent the organization externally, as necessary, particularly in banking and lease negotiations.

Team Development/Leadership

- Oversee, direct, and organize the work of the finance and operations teams.
- Promote a culture of high performance and continuous improvement that values learning and a commitment to quality.
- Ensure staff members receive timely and appropriate training and development.
- Establish and monitor staff performance and development goals, assign accountabilities, set objectives, establish priorities, conduct annual performance appraisals, and administer salary adjustments.
- Mentor and develop staff using a supportive and collaborative approach: assign accountabilities; set objectives; establish priorities; and monitor and evaluate results.

Operations

- Upgrade and implement an appropriate system of policies, internal controls, accounting standards, and procedures.
- Plan, coordinate, and execute the annual budget process.
- Ensure that XYZ Nonprofit is adhering to the strategic plan, delivering status reports to the board.
- Provide analytical support to XYZ Nonprofit's internal management team including development of internal management reporting capabilities.
- Improve administrative and operational accounting services such as treasury management, 403-B plan, grants payment processing, payroll, accounts payable, and purchasing.

Qualifications

- Business or Accounting degree mandatory, a master's in business administration is preferred
- CPA preferred
- Minimum 10 years experience in a senior management role ideally with both external audit and in-house financial management experience gained in a high-growth organization
- Experience either as an employee or board member of a nonprofit organization; must be familiar with nonprofit finance and accounting regulations
- Proven track record of success facilitating progressive organizational change and development within a growing organization
- Excellent judgment and creative problem solving skills including negotiation and conflict resolution skills
- Strong mentoring, coaching experience to a team with diverse levels of expertise
- Entrepreneurial team player who can multitask
- Superior management skills; ability to influence and engage direct and indirect reports and peers
- Self reliant, good problem solver, results oriented
- Energetic, flexible, collaborative, and proactive; a team leader who can positively and productively impact both strategic and tactical finance and administration initiatives.
- Exceptional written, oral, interpersonal, and presentation skills and the ability to effectively interface with senior management, XYZ Nonprofit's board of directors, and staff
- Ability to operate as an effective tactical as well as strategic thinker
- Passion for XYZ Nonprofit's mission

Sample Job Description: Chief Operating Officer (Generalist)

This sample job description is for the generalist nonprofit chief operating officer who oversees all internal functions. This nonprofit COO oversees everything internal, freeing up the ED to focus on external matters such as fundraising, public relations, and partnerships.

Feel free to use and modify this sample job description to help you create one for your organization.

Sample Description

ABC Nonprofit
Chief Operating Officer

Organization

Founded in 1987, ABC Nonprofit's mission is...

We do this by...

For more information, please visit www.ABCnonprofit.org.

Position

ABC Nonprofit has been growing steadily and is now seeking to dramatically accelerate growth. The board and executive director (ED) are looking for a mission-focused, seasoned, strategic, and process-minded leader with experience scaling an organization, leading an executive management team, and developing a performance culture among a group of diverse, talented individuals. The COO must be a leader who is able to help others at ABC deliver measurable, cost-effective results that make the vision a reality. Importantly, the successful COO will have the skills, sensitivity, and personal confidence to tap into the power that each member of the team brings to this mission. While it is essential that the COO bring efficient and effective systems to increase the productivity of the organization, it is also critical that the team retain the creative spark that drives the ABC concept.

Responsibilities

Reporting to the Founder and ED of ABC Nonprofit, the COO will lead all internal operations and will have the following responsibilities:

- Working in partnership with the Founder and ED, create the strategic five-year plan and implement new processes and approaches to achieve it.
- Serve as the internal leader of the organization:
 - Coordinate the annual operations plan and budget.
 - Lead the performance management process that measures and evaluates progress against goals for the organization.
 - Provide for all staff a strong day-to-day leadership presence; bridge national and regional operations and support an open-door policy among all staff.
- Lead and manage the organization's vice presidents, who have the following responsibilities:
 - **Site Development**
 - Raise local funds.
 - Build local fund raising and sales infrastructures within local offices.
 - Generate sufficient local revenue to cover local costs.
 - Increase fee-for-service contracts.
 - Identify geographic growth opportunities and priorities.
 - Communicate the branded message internally and externally.
 - **Program**
 - Increase key impact measurements.
 - Ensure that all programmatic partners renew their contracts.
 - Develop curriculum, tools, and training that meet cost guidelines.
 - **Finance, Technology, and Human Resources**
 - Produce and implement a Balanced Scorecard metric throughout the organization.
 - Cultivate the values of ABC within the organization.
 - Instill a human capital development and “coaching” culture within ABC; upgrade human resources functions including: training, development, compensation and benefits, employee relations, performance evaluation and recruiting.
 - Develop an accounting system that provides the organization with quick access to financial information and enables strategic budgeting.
 - Analyze the current technology infrastructure and scope out the next level of information technology and financial systems that support the growth of specific programs and the organization overall.

- **Fund Raising**—function reports to ED; dotted-line reporting to COO on:
 - Budgeting
 - Development and implementation of systems for reporting, measurement and supporting local revenue generation
 - Administrative aspects including proposal preparation and granting writing
- Work with the national board of directors: present to the board at quarterly meetings and serve on several board committees.

Key Qualifications

The successful candidate will most likely have had management experience with a for-profit organization. As noted, this is an organization driven by the values of its people, so experience in managing a “values-driven” organization will be highly prized. Additional requirements are:

- Results-proven track record of exceeding goals and a bottom-line orientation; evidence of the ability to consistently make good decisions through a combination of analysis, wisdom, experience, and judgment; high level of business acumen including successful P&L management; the ability to balance the delivery of programs against the realities of a budget; and problem solving, project management, and creative resourcefulness
- Strategic Vision and Agility—ability to think strategically, anticipate future consequences and trends, and incorporate them into the organizational plan
- Capacity Building—ability to effectively build organization and staff capacity, developing a top-notch workforce and the processes that ensure the organization runs smoothly
- Leadership and Organization—exceptional capacity for managing and leading people; a team builder who has experience in scaling up organizations; ability to connect staff both on an individual level and in large groups; capacity to enforce accountability, develop and empower top-notch leaders from the bottom up, lead from the top down, cultivate entrepreneurship, and learn the strengths and weaknesses of the team so as to put people in a position to succeed
- Action Oriented—enjoys working hard and looks for challenges; able to act and react as necessary, even if limited information is available; not afraid to take charge of a situation; can overcome resistance to leadership and take unpopular stands when necessary
- General Management—thorough understanding of finance, systems, and HR; broad experience with the full range of business functions and systems, including strategic development and planning, budgeting, business analysis, finance, information systems, human resources, and marketing
- Solid educational background—undergraduate degree required; MBA or similar advanced degree highly desired

Compensation

This is an outstanding opportunity for a highly motivated professional to assume a pivotal role in the evolution of a fast-growing, highly respected organization. We are seeking an individual of outstanding quality with a respected track record. ABC is prepared to offer a very attractive compensation package, including a competitive base salary as well as health, 401(k), and vacation benefits.

Sample Job Description: Chief Operating Officer (Program-Focused)

This sample job description is an illustration of a program focused chief operating officer. In contrast to the operations/administrative-focused nonprofit chief operating officer, some COOs are responsible primarily for programs, while the ED, the chief financial officer, or another senior executive oversees the more administrative functions.

Feel free to use and modify this sample job description to help you create one for your organization.

Sample Description

XYZ Nonprofit
Chief Operating Officer

Organization

Founded in 1987, XYZ Nonprofit's mission is...

We do this by...

For more information, please visit www.XYZnonprofit.org.

Position

Reporting to the Chief Executive Officer (CEO), the Chief Operating Officer (COO) is responsible for leading and managing a comprehensive array of services and programs. The COO will lead five regional directors and more than 10 program models delivered across the 40 sites with a program staff of 500. She or he will review on an ongoing basis services being offered and develop new programs as needs emerge. She or he will be responsible for all activities pertaining to licensure, human rights, personnel, finance, and contracts. The COO will inform the chief executive officer, and ultimately the board of directors, of all program issues and accomplishments.

The COO will partner with her/his peers—the chief financial officer and the directors of human resources, information technology, quality improvement, and corporate communications—while also being responsible for all program planning, organizing, operating, and staffing. She or he is responsible for developing, implementing, and managing the program aspects of the annual

budget in conjunction with the chief financial officer and CEO. She or he is responsible for ensuring that XYZ Nonprofit's services are in compliance with all federal, state, funding, and city regulations, certifications, and licensing requirements. Finally, the COO will assist the CEO in planning, organizing, and implementing public and private fund-raising initiatives.

Responsibilities

- Provide effective and inspiring leadership, as well as stewardship, of XYZ Nonprofit by being actively involved in all programs and services. Implement and lead a continuous quality improvement process throughout the program and service areas, focusing on systems/process improvement. Promote regular and ongoing opportunities for all staff to give feedback on program operations.
- Lead a high performing team of regional and program directors to the next level by further developing and implementing recruitment, training, and retention strategies.
- Partner with the CEO to represent XYZ Nonprofit with external constituency groups, including community, governmental, and private organizations.
- Ensure that all program activities operate consistently and ethically within the mission and values of XYZ Nonprofit.
- Prepare and submit an annual operational budget to the CEO and CFO for review and approval, manage effectively within this budget, and report accurately on progress made and challenges encountered.
- Ensure the continued financial viability of XYZ Nonprofit's program/service units through sound fiscal management. Provide programmatic leadership and input for all strategic planning processes with the CEO and staff.

Qualifications

- At least 10 years of professional experience overall, with a minimum of five years of senior-leadership experience supervising seasoned staff operating multiple human services programs across a broad geography. Solid educational background including an undergraduate degree and an MBA or similar advanced degree.
- Strong relationship builder and communicator with experience leading diverse work teams, developing an organization-wide strategy for program excellence, engaging community partners, and partnering with a CEO and board of directors.
- Can point to tangible examples of reporting and program measurement and evaluation. Demonstrates integrity, strives for excellence in her/his work, and has experience of leading others to new levels of effectiveness and programmatic impact.

- Passionate about XYZ Nonprofit's mission and able to promote and communicate the philosophy, mission and values of XYZ Nonprofit to external and internal stakeholders.
- Ability to travel 50 percent of the time to provide on-site leadership for multi-state operating units and programs.

Compensation

This is an outstanding opportunity to lead a highly-effective nonprofit's program area and partner with the CEO and senior management team. XYZ Nonprofit will offer a competitive compensation package including base salary, bonus, health, 401k and vacation benefits.

XYZ Nonprofit is an Equal Opportunity employer. Personnel are chosen on the basis of ability without regard to race, color, religion, sex, national origin, disability, marital status or sexual orientation, in accordance with federal and state law.

Sample Job Description: Chief Operating Officer (Strategy/Operations)

The COO role described in this job description has overall strategic and operational responsibility for all programs. In addition, the individual in this role also manages a group of program directors and work with the nonprofit's board of directors to keep them abreast of programmatic changes.

Feel free to use and modify this sample job description to help you create one for your organization.

Sample Description

Reporting to the executive director (ED), the Chief Operating Officer (COO) will have overall strategic and operational responsibility for all XYZ Nonprofit programs and will manage a group of program directors. As the chief program officer of XYZ Nonprofit, she or he will provide leadership to the XYZ Nonprofit strategic planning process and will implement new programmatic strategic initiatives. In addition, the COO will: provide coordination for the XYZ Nonprofit senior management team; serve as liaison to XYZ Nonprofit's partners; and work with XYZ Nonprofit's Board of Directors to keep them abreast of programmatic strategies and challenges.

The COO will partner with the ED and her/his peers (the chief financial officer (CFO), director of development, and director of human resources) and will be responsible for developing, implementing, and managing the operational aspects of the annual budget. Finally, the COO will cultivate existing relationships with public and private funders.

Responsibilities

Program Operational Leadership

- Provide effective and inspiring leadership by being actively involved in all programs and services, developing a broad and deep knowledge of all programs.
- Identify opportunities for XYZ Nonprofit to leverage cross-program strengths to take advantage of new opportunities and/or to address organizational challenges.
- Lead, coach, develop, and retain XYZ Nonprofit's high-performance senior management team with an emphasis on developing capacity in strategic analysis and planning and program budgeting.

- Develop and implement training programs and retreats to expand the capacity of all staff.
- Prepare and submit an annual operational budget, manage effectively within this budget, and report accurately on progress made and challenges encountered.
- Ensure the continued financial viability of XYZ Nonprofit's operational units through sound fiscal management.

External Relationship Development

- Manage and cultivate existing relationships with funders to secure and expand recurring revenue streams.
- Publicly represent XYZ Nonprofit with the media and external constituency groups including community, governmental, and private organizations and build excitement for XYZ Nonprofit's mission.

Strategic Plan Implementation

- Provide programmatic leadership and input for all strategic plan implementation processes with the ED and staff. Coach program directors as they implement the strategic plan and transition program operations.
- Develop and implement a system for tracking and reporting on the progress of the strategic plan implementation.

Qualifications

This is an extraordinary opportunity for an individual with extensive program management experience to grow and further develop a proven program that has already made significant impact. The successful candidate will partner with the ED and work collaboratively with a high-performance management team.

Specific requirements include:

- Minimum BS/BA degree with at least 10 years of experience and a track record in senior program management.
- Excellence in organizational management with the ability to coach a senior-level staff to manage and develop high-performance teams and develop and implement program strategies.
- Deep experience in program budgeting and fiscal management.
- Track record of effectively leading a direct service organization with a complex array of programs with the ability to leverage strengths across program areas; excellent project management skills.
- Analytic and decisive decision maker with the ability to prioritize and communicate to staff key objectives and tactics necessary to achieve organizational goals.
- Ability to point to specific examples of having led organizational transformation projects and program development.

- Past experience managing human resources function including personnel, compensation, and recruiting.
- Unwavering commitment to quality programs and data-driven program evaluation.
- Fundraising experience with the ability to engage a wide range of stakeholders and cultures.
- Strong written and verbal communication skills; a persuasive and passionate communicator with excellent public speaking skills.
- Action-oriented, entrepreneurial, flexible, and innovative approach to operational management.
- Passion, humility, integrity, positive attitude, mission-driven, and self-directed.

Sample Job Description: Deputy Director

This job description is the broadest of the COO-track positions: the role oversees everything internal, freeing up the executive director to focus on external matters such as fundraising, public relations, and partnerships.

Feel free to use and modify this sample job description to help you create one for your organization.

Sample Description

Reporting to the executive director (ED), the Deputy Director will have both internal and external facing responsibilities, ranging from client and project management (business development, framing of key approaches, high-quality client delivery, written products) to administration (information technology, reporting, facilities), and human capital (HR/recruiting, mentoring, career progression). The Deputy Director will partner closely with the ED to chart XYZ Nonprofit's future growth and strategic response to an ever-increasing demand for the organization's services.

Responsibilities

Project Development, Management, and Client Relations/Management

- Structure and lead teams to deliver outstanding client work.
- Build and maintain strong client relationships; exceptional relationship-builder.
- Represent XYZ Nonprofit in industry-group conferences, professional associations, and other public venues.
- Develop thought leadership around specific topics/emerging practice areas.
- Share in knowledge dissemination, reporting, and communications.

Firm Building

- Partner with the ED in essential internal firm leadership activities (human resources, administration, and organizational planning).
- Manage increasing segments of information technology, human resources (recruiting, reviews, staff deployment/workload balancing, career progression) with related internal communications and budgeting/finance duties.
- Identify best practices and improve internal systems with an eye toward future needs and budget realities.
- Mentoring, coaching; visible, approachable sounding board/resource

Qualifications

- 15-plus distinguished years in a senior management position in a nonprofit organization, foundation, or government agencies
- Highly intelligent, advanced/MBA degree from a leading university
- Track record delivering superior results, commanding respect, and assuming leadership roles
- Success in roles requiring execution of multiple tasks while responding to multiple priorities
- Proven ability to work with efficiency, flexibility, and good humor
- Demonstrated ability to build and maintain relationships with a wide array of people—junior and senior, for-profit and nonprofit, and from diverse backgrounds
- Operates with excellence in mind in all matters, with the confidence to defend/ debate ideas without ego interfering
- Outstanding communication and interpersonal skills are essential
- Passionate about XYZ Nonprofit's mission and impact
- Ability to exercise tact and diplomacy in organizational settings
- Transparent, direct, with substance
- Self-starter, self disciplined
- Spark, imagination, creativity
- Remain focused in the face of pressure, delivers against timelines, not intimidated by tasks/time limitations

Sample Job Description: Vice President, Finance and Operations

While the emphasis of this role is finance, it includes responsibilities for managing a breadth of staff functions and requires an individual who is both strategic and tactical.

Feel free to use and modify this sample job description to help you create one for your organization.

Sample Description

Reporting to the president and serving as an integral member of the senior management team, the Vice President of Finance and Operations (VP) will be responsible for the development of XYZ Nonprofit's financial management strategy and contribute to the development of the organization's strategic goals. In addition to the strategic components, the VP will be charged with developing and implementing more sophisticated policies and procedures both in the finance and general operational realms. This is an outstanding opportunity for a finance executive with operational experience and a proven track record of creative problem-solving and change management to join in a high-growth, mission-driven organization.

Responsibilities

Strategy, Vision and Leadership

- Advise the president and other key members of senior management on financial planning budgeting, cash flow, investment priorities, and policy matters.
- Serve as the management liaison to the board and audit committee; effectively communicate and present critical financial matters at select board of directors and committee meetings.
- Contribute to the development of XYZ Nonprofit's strategic goals and objectives as well as the overall management of the organization.
- Maintain continuous lines of communication, keeping the president informed of all critical issues.
- Represent the organization externally, as necessary, particularly in banking and lease negotiations.

Team Development/Leadership

- Oversee, direct, and organize the work of the finance and operations teams.
- Promote a culture of high performance and continuous improvement that values learning and a commitment to quality.
- Ensure staff members receive timely and appropriate training and development.
- Establish and monitor staff performance and development goals, assign accountabilities, set objectives, establish priorities, conduct annual performance appraisals, and administer salary adjustments.
- Mentor and develop staff using a supportive and collaborative approach: assign accountabilities; set objectives; establish priorities; and monitor and evaluate results.

Operations

- Upgrade and implement an appropriate system of policies, internal controls, accounting standards, and procedures.
- Plan, coordinate, and execute the annual budget process.
- Ensure that XYZ Nonprofit is adhering to the strategic plan, delivering status reports to the board.
- Provide analytical support to XYZ Nonprofit's internal management team including development of internal management reporting capabilities.
- Improve administrative and operational accounting services such as treasury management, 403-B plan, grants payment processing, payroll, accounts payable, and purchasing.

Qualifications

- Business or Accounting degree mandatory, a master's in business administration is preferred
- CPA preferred
- Minimum 10 years experience in a senior management role ideally with both external audit and in-house financial management experience gained in a high-growth organization
- Experience either as an employee or board member of a nonprofit organization; must be familiar with nonprofit finance and accounting regulations
- Proven track record of success facilitating progressive organizational change and development within a growing organization
- Excellent judgment and creative problem solving skills including negotiation and conflict resolution skills
- Strong mentoring, coaching experience to a team with diverse levels of expertise
- Entrepreneurial team player who can multitask

- Superior management skills; ability to influence and engage direct and indirect reports and peers
- Self reliant, good problem solver, results oriented
- Energetic, flexible, collaborative, and proactive; a team leader who can positively and productively impact both strategic and tactical finance and administration initiatives.
- Exceptional written, oral, interpersonal, and presentation skills and the ability to effectively
- interface with senior management, XYZ Nonprofit's board of directors, and staff
- Ability to operate as an effective tactical as well as strategic thinker
- Passion for XYZ Nonprofit's mission

Communications Sample Job Descriptions

The configuration of the senior communications role in some cases is determined by the complexity and focus of the communication function within the organization. For example, in the Director of Communications job description, the focus of the role is on developing and implementing a communications plan that includes online activities and the organization's annual meeting. Because the organization also has a vice president of communications, the director of communications focuses on providing information.

In the Vice President, Communications description, the organization has focused its communication role on branding and public relations. The individual in this communications role will be part of the senior leadership team representing the organization externally.

The communications role's variability is further illustrated in the Director of Communications and Public Affairs description. In this organization with \$10 million to \$20 million in revenues, the role crosses over with advocacy work—an unusual configuration that demonstrates how search committees will design specifications to meet organizational needs.

Each sample job description is intended to be a jumping off point, and likely will need to be tailored to meet the particular needs of your organization. Feel free to use and tailor these descriptions for your needs.

Sample Job Description: Vice President of Communications

This vice president, communications role is strategic and has a heavy emphasis on brand management. This role is responsible for managing all communications plan activities and building external relationships with the organization's constituencies, including funders and the media.

Feel free to use and modify this sample job description to help you create one for your organization.

Sample Description

Reporting to the president, and serving as an integral member of the senior management team, the Vice President (VP) of Communications will be responsible for the development of XYZ Nonprofit's communication strategy and will contribute to XYZ Nonprofit's organizational strategic planning process. The VP of Communications will develop a world-class communications plan for XYZ Nonprofit, directly managing communications activities that promote, enhance, and protect the organization's brand reputation. The VP of Communications will be responsible for the development, integration, and implementation of a broad range of public relations activities relative to the strategic direction and positioning of the organization and its leadership. This individual will be an ambassador for the organization and will need to build relationships with the media. The goal is to advance the organization's position with relevant constituents, as well as to drive broader awareness and donor support for the organization. The VP of Communications will be responsible for XYZ Nonprofit's varied and integrated communications products and services including: newsletters and other print publications; web, enews, and other online communications; media and public relations; and marketing.

Responsibilities

Communications Strategy, Vision and Leadership

- Develop and implement an integrated strategic communications plan to advance XYZ Nonprofit's brand identity; broaden awareness of its programs and priorities; and increase the visibility of its programs across key stakeholder audiences.
- Create marketing/public relations strategy that will allow XYZ Nonprofit leadership to cultivate and enhance meaningful relationships with targeted, high-level external audiences, including the media and key influencers.

- Identify challenges and emerging issues faced by the organization. Work with leadership team and staff to recognize internal and external communications opportunities and solutions, and define and execute appropriate strategies to support them.
- Serve as communications counselor to XYZ Nonprofit leadership.

Communications Operations

- Oversee development of all XYZ Nonprofit print communications including the annual report, marketing collateral materials and electronic communications including XYZ Nonprofit's website and new media; manage relationships with associated vendors.
- Serve as a spokesperson and lead point person on media interactions that help promote and/or impact the organization.
- Exercise judgment to prioritize media opportunities, and prepare talking points, speeches, presentations, and other supporting material as needed.
- Actively engage, cultivate, and manage press relationships to ensure coverage surrounding XYZ Nonprofit programs, special events, public announcements, and other projects.
- Oversee the day-to-day activities of the communications function including budgeting, planning, and staff development.

Team Development/Management

- Recruit and manage a communications team to support the development and execution of the communications strategy.
- Promote a culture of high performance and continuous improvement that values learning and a commitment to quality.
- Mentor and develop staff using a supportive and collaborative approach on a consistent basis.
- Establish and monitor staff performance and development goals, assign accountabilities, set objectives, establish priorities, conduct annual performance appraisals, and administer salary adjustments.

Qualifications

- Bachelor's degree in journalism, communications, or related field is required, an advanced degree is preferred
- Minimum 10 years experience in a senior management role either in-house or with an agency
- Demonstrated skill and comfort in proactively building relationships with top tier reporters and editors, and in successfully positioning subject matter with the media to achieve high-impact placements
- Extensive successful writing and editing experience (externally focused) with a variety of print and online communications media

- Demonstrated experience and leadership in managing a comprehensive strategic communications, media relations, and marketing program to advance an organization's mission and goals
- Creative and thoughtful on how new media technologies can be utilized
- A minimum of five years experience in planning, writing, editing, and production of newsletters, press releases, annual reports, marketing literature, and other print publications and directories
- Innovative thinker, with a track record for translating strategic thinking into action plans and output
- Experience in building, mentoring, and coaching a team of communications specialists
- Excellent judgment and creative problem solving skills, including negotiation and conflict resolution skills
- Superior management skills; ability to influence and engage direct and indirect reports and peers
- Stature, gravitas, and confidence to gain the credibility and respect of high-performing Board of Directors
- Self reliant, good problem solver, results oriented
- Ability to make decisions in a changing environment and anticipate future needs
- Excellent and persuasive communicator
- Energetic, flexible, collaborative, and proactive; a team leader who can positively and productively impact both strategic and tactical finance, and administration initiatives
- Exceptional written, oral, interpersonal, and presentation skills and the ability to effectively interface with senior management, XYZ Nonprofit's Board of Directors and staff
- Ability to operate as an effective tactical as well as strategic thinker
- Passion for XYZ Nonprofit's mission

Sample Job Description: Director of Communications and Public Affairs

This director of communications works with the senior management team to develop the communications plan (as opposed to developing it independently) and has a staff of four. In contrast to the other communications positions, this role entails identifying public policy issues relevant to the organization.

Feel free to use and modify this sample job description to help you create one for your organization.

Sample Description

XYZ Nonprofit

Director of Communications and Public Affairs

The Director of Communications and Public Affairs will lead an initial team of four and coordinate the organization's overall communications strategy. Reporting to the Chief Executive Officer, the Director of Communications and Public Affairs will work collaboratively with senior leadership to develop and implement communication strategies to broaden the impact of XYZ Nonprofit's programs and oversee organizational messaging and constituent services.

Responsibilities

- Collaborate with the CEO and senior leadership to develop communications strategies that will broaden programmatic reach and deepen impact.
- Develop and refine XYZ Nonprofit's "core" messages to ensure organizational consistency.
- Identify significant media and public policy issues that can be leveraged to support XYZ Nonprofit's work, and create and implement plans to exploit them.
- Serve as executive editor for the organization's website.
- Oversee organizational response to inquiries about XYZ Nonprofit.

Qualifications

- Significant communications experience that includes a blend of advocacy and media relations
- A strong track record of positioning an organization to achieve tangible outcomes in a competitive communications environment
- Ability to coach and support senior leaders as spokespersons

Development Sample Job Descriptions

In organizations with revenues greater than \$20 million, the director of development may be part of a larger development team, reporting to a vice president within the organization and having his or her own team to manage. In the Director of Development, Large Organization description the director has a team in addition to a full array of development responsibilities, as compared to the development manager in the smaller organization, noted above, where the majority of the work is done by the individual manager.

Each sample job description is intended to be a jumping off point, and likely will need to be tailored to meet the particular needs of your organization. Feel free to use and tailor these descriptions for your needs.

Sample Job Description: Vice President, Development

In this job description, the vice president of development both supports the executive director's fundraising activities and is a key fundraiser responsible for expanding and diversifying the organization's funder base. The position requires the ability to develop and implement a strategic development plan.

Feel free to use and modify this sample job description to help you create one for your organization.

Sample Description

XYZ Nonprofit Vice President Development

Reporting to the Executive Director (ED), the Vice President (VP), Development serves as a key leadership team member and an active participant in making strategic decisions affecting XYZ Nonprofit. In partnership with the ED, this position is responsible for all fundraising and development activities. The successful candidate will help forge new relationships to build XYZ Nonprofit's visibility, impact, and financial resources. The VP, Development also will design and implement a comprehensive plan for developing key external alliances by cultivating individual and philanthropic support.

The VP, Development will have primary responsibility for establishing and implementing the infrastructure needed to grow a \$XM budget through the solicitation of major gifts, federal and state grants, special events, and corporate and foundation support.

She or he will expand and diversify XYZ Nonprofit's donor base/pipeline and work closely with other team members to secure funding for new initiatives. In addition, the VP will work closely with the board of directors and support board members as they take on a more active fundraising role.

It is expected that the amount raised by XYZ Nonprofit will increase in future years as the VP, Development systematically and effectively strengthens the organization's overall fundraising capacity.

Responsibilities

- Support and partner with the ED and board members on all major fundraising initiatives
- Collaborate with the Chief Operating Officer (COO) to develop and implement XYZ Nonprofit's financial strategy
- Actively work with the ED and senior staff to develop and implement a comprehensive development strategy to include corporate, foundation, government grants, etc.
- Have primary responsibility for development and execution of all proposals; write and archive all proposals with a long-term relationship-management approach
- Oversee research funding sources and trends, with foresight, to help position XYZ Nonprofit ahead of major funding changes or trends
- Monitor all donor information; provide and present statistical analysis to board and senior leaders
- Develop and implement a stewardship program aimed at cultivating deeper ties with donors
- Monitor and report regularly on the progress of the development program
- Identify, develop, and mentor the development team

Qualifications

- 10-plus years of professional experience in a nonprofit organization; demonstrated success in a development function (managing and forging relationships with multiple donor sources)
- Tangible experience of having expanded and cultivated existing donor relationships over time
- Excellent communication skills, both written and oral; ability to influence and engage a wide range of donors and build long-term relationships
- Strong organizational skills
- Flexible and adaptable style; a leader who can positively impact both strategic and tactical fundraising initiatives
- Ability to work both independently without close oversight, but also a team player who will productively engage with others at varying levels of seniority within and outside XYZ Nonprofit
- Bachelor's degree required, Master's preferred
- High energy and passion for XYZ Nonprofit's mission is essential
- Ability to construct, articulate, and implement annual strategic development plan

- Strong organizational and time management skills with exceptional attention to detail
- Customer focus
- Excellent verbal and written communication skills
- A professional and resourceful style; the ability to work independently and as a team player, to take initiative, and to manage multiple tasks and projects at a time

Sample Job Description: Director of Development (Small Organization)

In this small and emerging organization, the director of development is responsible for building and executing the development plan, and implementing the information technology systems to support the function. She or he also is responsible for running special events.

Feel free to use and modify this sample job description to help you create one for your organization.

Sample Description

XYZ Nonprofit Director of Development

Reporting to and in partnership with the Executive Director (ED), the Development Director (Director) will spearhead development efforts as XYZ Nonprofit continues to grow. A new position in the organization, the Director will have the opportunity to build the development function.

Responsibilities

- Develop and execute XYZ Nonprofit's annual fundraising plan
- Secure financial support from individuals, foundations and corporations
- Manage the implementation of Raiser's Edge and oversee staff responsible for data entry and gift processing
- Develop and maintain ongoing relationships with major donors
- Creating and executing a strategy for a large sustained base of annual individual donors
- Overseeing organization of special events
- Developing and tracking proposals and reports for all foundation and corporate fundraising

Qualifications

- BA (required), MA (a plus)
- Five-plus years experience in development
- Demonstrated excellence in organizational, managerial, and communication skills
- Knowledge of Raiser's Edge

Sample Job Description: Director of Development (Large Organization)

This sample job description shares how one large nonprofit organization configured its director of development role. Reporting to the vice president of development, she or he is tasked with creating a development strategy, and hiring and managing staff members. The position also entails direct fundraising, and working with and supporting the senior management team with its fundraising plans.

Feel free to use and modify this sample job description to help you create one for your organization.

Sample Description

XYZ Nonprofit Director of Development

Reporting to and working in close collaboration with the Vice President (VP), Development, the Director of Development will design and execute on a comprehensive development strategy for XYZ Nonprofit. The Director of Development will oversee and execute on both capital campaigns and ongoing fundraising efforts. She or he also will form and manage the XYZ Nonprofit development team.

Responsibilities

- Design development strategy for XYZ Nonprofit: Work with the management team to identify funds needed, preferred funding targets, and approaches
- Form and manage development team: Work with the VP of Development and senior leadership team to form a development team
 - Identify staffing needs for capital campaigns and ongoing development
 - Interview candidates and hire team members
 - Oversee development team, once formed
- Fundraising: Conduct research, prospecting, and application to multiple donor sources
 - Manage capital campaigns, engaging and overseeing capital campaign firms as necessary
 - Oversee ongoing development efforts

- Build a robust donor base: Develop and maintain key long-term relationships with donors and prospects
- Communicate and train: Train and mentor development staff and communicate fundraising goals and progress throughout XYZ Nonprofit

Qualifications

- Development/Fundraising: Proven success in development for a large nonprofit. Experience running capital campaigns and success fundraising from multiple donor channels
- Project Leadership: Experience in planning, leading, and managing development projects, including coordinating with peers to achieve desired outcomes, and tracking and reporting on progress to senior managers/board of directors
- Entrepreneurial Spirit: Takes initiative and actively seeks to deepen current donor relationships and to forge new ones
- Communications: Skilled in creating powerful, compelling written and oral communications for fundraising. Ability to convey complex ideas through brief, simple materials. Experience and credibility when presenting materials to external audiences
- Influencing: Gets others to accept ideas by using convincing arguments, creates a win-win situation and responds appropriately to key stakeholders
- Collaboration: Effective at working with others to reach common goals and objectives
- Relationship Building: Skilled at establishing and cultivating strong relationships with peers, across different levels of the organization and externally

Evaluation and Measurement

Sample Job Descriptions

Nonprofits that seek to use measurement to continuously improve their impact eventually may decide to create a full-time position to lead their performance measurement function.

But don't assume the best person for the job will necessarily be a "data wonk"—who can execute complex analyses that reveal powerful insights about an organization's programs. Few would argue the value of such a skill set, however, often more important can be the interpersonal and change management skills a Measurement Director should have. In addition to "hard skills" of understanding the data, Measurement Directors also need to have the "soft skills" that will ultimately help staff across the organization see the value of using measurement to make better decisions.

A clear and comprehensive job description is critical to attracting candidates who are a good fit with the role. But without gaining agreement among your leadership team around the specific responsibilities of the role, and the qualifications and experience level of the optimal candidate you want to attract, even the best written job descriptions and interview process will fail.

The following job descriptions have been shared by various nonprofit organizations. Each sample job description is intended to be a jumping off point, and likely will need to be tailored to meet the particular needs of your organization. Feel free to use and tailor these descriptions for your needs.

Sample Job Description: Director of Evaluation and Innovation (from Horizons for Homeless Children)

Position

Director of Evaluation and Innovation

The Organization

Extensive research has documented that significant early adversity and “toxic stress” in the lives of young children leads to a greater likelihood of developmental delays, as well as physical and mental health problems. Early childhood education is even more critical for children from disadvantaged backgrounds, especially homeless children. Horizons for Homeless Children (HHC) was founded in 1988 to serve young homeless children and their families.

With a current budget of almost \$10 million and staff numbering over 100, HHC assists more than 2,200

homeless children in Massachusetts each week through two direct service programs:

- Community Children’s Centers (CCCs), Boston’s only comprehensive, full-time early education and care centers specifically for young homeless children. HHC operates three CCCs within Boston; and
- Playspace Programs, which offer educational and recreational spaces in 140 family shelters across Massachusetts.

In addition to these programs, HHC also supports young homeless children and their families through policy and advocacy efforts, as well as training and technical assistance offerings for related service providers. In the organization’s first twenty years, HHC has staked out a unique position at the intersection of early education and homelessness and has established itself as the principal voice of on-the-ground experience with this population. Now, as a highly effective, well-regarded organization—and one confronted with pressing needs in Massachusetts (where on any given night, 7,300 children under age six are homeless) and nationwide (more than 650,000 children under age six are without a home at any one point)—HHC is ready to take its work to the next level.

HHC’s recently crafted strategic plan identifies three key ways in which the

organization can expand its work and deepen its influence on the lives of young children:

- Initiative 1: HHC seeks to deepen the impact of its programs on the lives of homeless children by maintaining our relationships with the children and families we serve after they leave the CCC's and by assisting them in obtaining high quality services to ensure their continued growth.
- Initiative 2: HHC seeks to further its existing advocacy efforts to improve conditions for young homeless children in MA by leveraging the power of alumni and active volunteers who share a commitment to its mission.
- Initiative 3: HHC seeks to build on its initial policy achievements by embarking on a broader nationwide advocacy campaign to educate state and national decision-makers about ways to better support young homeless children.

The Position

HHC is currently seeking an experienced and entrepreneurial professional to serve as its first Director of Evaluation and Innovation. A new position created to support the organization's new strategic plan, the Director of Evaluation and Innovation will lead the design and implementation of a coordinated and comprehensive strategy for measuring the impact of its site-based program (Boston's three CCC's, which serve 175 children and their parents each weekday) and its Family Services Program to ensure that the organization deepens and broadens its influence on the lives of homeless children.

The Director of Evaluation and Innovation, in collaboration with other HHC departments, will identify key areas for evaluation, build capacity for ongoing self-assessment, and lead efforts to conceptualize and implement a longitudinal strategic evaluation plan designed to improve internal program practices and to inform on a national level the field of early childhood education and policy. Working collaboratively with staff, this role provides an exciting opportunity for someone with a deep background in research and evaluation and a demonstrated commitment to family support services and programming to contribute to the continued growth and success of HHC.

This position will report to and work closely with the Chief Education and Training Officer.

Responsibilities

- Build capacity for, implement and manage internal systems for conducting ongoing outcomes measurement and assessment
 - Participate in conversations with HHC staff, Board members and other key stakeholders to determine appropriate metrics and benchmarks for organizational success

- Coordinate with IT staff on the development and implementation of a centralized assessment database
- Consolidate all current tools and practices for measuring impact to ensure cohesive, consistent, high quality data collection and analysis
- Manage the design and implementation of strategic longitudinal evaluation plan
 - Work closely with Chief Education and Training Officer to build on existing evaluation tools to create a strategic evaluation plan that measures progress and success against key metrics for both internal program improvement purposes as well as for external reporting purposes
 - Independently or with external vendors, design and implement evaluation tools to support the strategic evaluation plan including both quantitative and qualitative methods as appropriate
 - Oversee the use of evaluation as a tool in accomplishing program/project objectives and ensure that data is being collected accurately, analyzed appropriately and adapted as needed
 - Facilitate communication of policies, procedures, schedules and other logistics associated with the external evaluation.
 - Manage a portfolio of strategic evaluations, working closely with the program staff to assure that the evaluations provide quality, useful and timely information
- Disseminate and translate research findings to a variety of constituencies
 - Work with external stakeholders, including funders and early education partners, to assure best practices and transparency
 - Work with Chief Education and Training Officer and the senior leadership team to effectively communicate results both internally and externally
 - Create systems for using data to provide ongoing feedback and support to providers for the improvement of program practices.
 - Produce publications, presentations, research resources and briefing/white papers designed to inform the early education field and policy makers
- Manage all administrative aspects of research and evaluation, including budget, staffing, data collection logistics and other related duties as necessary

Qualifications

- Masters Degree in Public Policy, Social Science, Education or related field
- Experience in a fast-paced, entrepreneurial environment with a strong focus on metrics and datadriven decision making, preferably in a not for profit organization
- At least 2 years of successful experience with both quantitative and qualitative research methods, tool design and validation

- Demonstrated ability to conceptualize and implement new program and research briefs
- Demonstrated experience working with large quantitative and qualitative datasets, and working knowledge of quantitative and qualitative analysis methods and software (i.e., SPSS, SAS, Atlasti. etc.)
- Exceptional project management, prioritization, and planning skills, with demonstrated success producing high-quality deliverables on time and within budget
- Strong interpersonal skills and ability to work effectively in a team
- Excellent strategic thinking skills, with the ability to operationalize concepts and transform ideas into action as well as apply research findings to ongoing program development
- Prior experience working with homeless or underprivileged families and/or education and for low income children is preferred
- Knowledge of research and current trends in homelessness, the field of early education and care, the achievement gap and child development strongly preferred
- Passion for, and demonstrated commitment to, improving the lives of disadvantaged families; sensitivity to the needs of diverse racial and ethnic populations

Horizons for Homeless Children is an Equal Opportunity Employer and encourages candidates of all backgrounds to apply for this position.

(We would like to thank [Horizons for Homeless Children](#) for contributing this sample job description to the Nonprofit Hiring Toolkit.)

Sample Job Description: Director of Learning and Evaluation (from Latin American Youth Center)

Job Description / Position Announcement

Department: Learning and Evaluation
Title: Director of Learning and Evaluation
Category: Full Time

This is an immediate opening, applications will be reviewed on a rolling basis

General Description

The Latin American Youth Center (LAYC) is a not-for-profit organization serving immigrant and minority youth in the Washington, D.C. metropolitan area. LAYC seeks to help youth become successful and happy young adults by providing a comprehensive set of programs to meet youth where they are and help them build the skills they need to succeed and become change agents in their community. For additional information on LAYC, please visit our website: www.layc-dc.org

The Director of Learning and Evaluation is a member of LAYC's senior management team and will provide leadership and day-to-day management for all performance management and evaluation activities at LAYC. The Director will oversee the design and maintenance of LAYC's performance management systems, all data collection using Efforts-To-Outcomes software (ETO), and all internal evaluation efforts. The Director will also supervise a team of Learning and Evaluation Specialists and Assistants. For additional information on LAYC's Learning and Evaluation Department, please visit: <http://www.layc-dc.org/index.php/results.html>

Principal Duties

- Work in close cooperation with LAYC's Chief Operating Officer to update and maintain LAYC's performance management infrastructure, including the use of ETO and evaluation of each LAYC program.
- Design or modify specific data collection instruments for each LAYC program such as pre/post-tests, surveys, assessments, interview guides, and focus group protocols;

- Analyze collected output, attendance/dosage, and outcome data and prepare reports for internal use and external distribution summarizing analyzed results. Disseminate evaluation results to LAYC partners, including federal and municipal agencies, foundations, community organizations, and youth;
- Act as liaison between LAYC and all external evaluation projects and organizations;
- Work closely with LAYC's Development / Fundraising Office to provide outcome information for proposal writing and author text for evaluation plans and logic models;
- Represent LAYC publically and regularly present/speak on LAYC's evaluation and performance management work to a variety of audiences (existing and potential funders, government officials, foundations, etc.);
- Supervise team of Learning and Evaluation Specialists and Assistants and ensure smooth operation of the Learning and Evaluation Division, including identifying and overseeing professional development opportunities;
- Promote a culture of reflection, learning, and data-based decision making among LAYC staff and participants.

Requirements

- Master's degree in public policy, public administration, public affairs, sociology, history, social work or related field that includes background on research and evaluation, outcome measurement, or statistics.
- A minimum of six years experience in performance management, evaluation, or related research practices.
- Experience working with databases, performance management systems, or other data collection systems. Experience with Efforts to Outcomes (ETO) strongly preferred.
- Experience completing research, evaluation, or performance management projects in one or more of LAYC's primary service and outcome areas: academic enrichment, employment and workforce training, housing for homeless / foster care youth, substance abuse and mental health treatment, gang prevention and intervention, or general youth development.
- Prior experience managing or overseeing research, evaluation, or performance management projects. This should include experience supervising staff, project budgeting and planning, and managing workflow.
- Complete criminal record clearance and medical clearance upon hiring.

Preferred Skills

- Fluency in written and spoken English. Fluency in written and spoken Spanish

preferred. Experience translating documents from English to Spanish is also preferred.

- Very strong general computer skills.
- Excellent organizational and communication (verbal and written) skills.
- Extensive experience with spreadsheets, including use of Microsoft Excel. Ability to work with databases, (such as Microsoft Access) and experience with statistical analysis packages, including SPSS.
- Ability to design, modify, or administer written assessment instruments (pre/post tests and surveys) on youth development topics.
- Ability to provide ongoing staff training on data collection methods, evaluation concepts, and use of computers for data entry.
- Experience in design and modification of program logic models / theory of change models (or similar planning documentation).
- Ability to deal effectively with a wide range of individuals and organizations.
- Ability to oversee or assist in the completion of focus groups with youth and adult participants. Ability to conduct focus groups in Spanish preferred.

Supervision

This position reports directly to the LAYC's Chief Operating Officer.

(We'd like to thank the [Latin American Youth Center](#) for contributing this job description to the [Nonprofit Hiring Toolkit](#).)

Sample Job Description: Research Director (from The Mission Continues)

Position Specification

Director of Strategy and Research

About the Organization

The Mission Continues (“TMC”) is a 501(c)(3) not-for-profit organization whose mission is to build an America where every returning veteran can serve again as a citizen leader and where together we honor the fallen by living their values through service. TMC accomplishes its mission through its Fellowship Program for post-9/11 veterans, service projects for veterans and civilians of all backgrounds and thought leadership efforts seeking to change the way the nation welcomes home this generation of veterans. The organization was founded in 2007 by Eric Greitens, current CEO, Rhodes Scholar, Navy Seal and author of “The Heart and the Fist.”

TMC is a rapidly growing organization that has been recognized by the Draper Richards Foundation, New Profit and Manhattan Institute as one of the country’s most socially innovative non-profit organizations. To date, it has awarded over 200 fellowships to wounded and disabled veterans and empowered more than 15,000 volunteers to serve in their communities. Fundraising efforts have grown from raising \$27,000 in 2007 to \$7M in 2011 revenues.

As the organization grows, TMC is looking to add team members who can help TMC achieve the scale necessary to fundamentally reshape the way the nation welcomes home this generation of veterans. The organization is fully dedicated to the personal and professional development of every member of the team.

About the Position

This is an exciting opportunity for an innovative leader to play a key role in positioning The Mission Continues as a leading national veterans’ organization that empowers returning veterans to continue serving their country here at home. TMC is seeking a Director of Strategy and Research to help refine and assess the organization’s work.

The location for this position is flexible with a strong preference for New York, NY followed by any location along the Northeast Corridor or St. Louis, MO. This position will report directly to the Chief Operating Officer.

Responsibilities of the role are as follows:

- Assess and refine the organization's existing strategy, helping The Mission Continues to achieve its mission and deliver on its strategic objectives; recommend programmatic and operational improvements, where appropriate.
- Develop and manage the design, implementation and oversight of TMC's research and evaluation processes
- Steward and cultivate high-level relationships with consultants and advisors; serve as the primary liaison to outside evaluation partners
- Partner with TMC senior management to determine which program areas warrant outside evaluation and what can be accomplished through internal data collection
- Partner with the development and programs departments as part of a broad knowledge management strategy to refine service delivery and outcomes
- Cultivate and maintain a library of all relevant program measurement data that is up-to-date and easily accessed by the entire TMC organization
- Help to design transparent, standardized and easily accessible systems for capturing, integrating and distributing measurement data across the organization
- Partner with the brand and communications team to ensure that accurate and compelling data is integrated into marketing collateral and key communications messages
- Serve as a key resource and strategic thought partner to senior managers throughout the organization
- Manage a variety of high-impact special projects for the COO, conducting relevant research and analysis on an as-needed basis

Candidate Qualifications

Candidates should possess the following:

- A minimum of 6 - 8 years of experience developing and executing data and information driven strategies and projects
- Experience leading cross-departmental projects composed of a high-performing team with diverse skill sets
- Disciplined, structured and data driven approach to decision making and problem solving with a sharp focus on metrics, outcomes and results
- Deep creativity and an ability to use data to uncover potential opportunities for growth and innovation across all departments
- Strong computer skills, especially Excel and database management systems
- Exceptional interpersonal skills; ability to collaborate and effectively interact with external evaluators and to build partnerships around common interests and goals

- Deep entrepreneurialism and flexibility, with an ability to maneuver effectively in the face of uncertainty and transition
- Demonstrated ability to work independently in a fast-paced environment, lead projects, meet multiple concurrent deadlines, organize time and priorities, and work well as a member of a team
- An exceptionally high level of integrity, trust, accountability and superior judgment
- Mature, professional demeanor and a commitment to continued professional growth
- Demonstrated experience with knowledge management and content management practices
- Experience within or advising a foundation, public advocacy organization, high-impact non-profit, research firm or strategy consulting firm strongly preferred
- Commitment to the mission of empowering veterans to serve again here at home; close experience with veterans is a plus
- Bachelor's degree required; Master's degree preferred

Location

Flexible (Washington, D.C., New York, NY or St. Louis, MO preferred)

Compensation

Competitive compensation commensurate with experience

(We'd like to thank [On-ramps](#) for contributing this job description to the Nonprofit Hiring Toolkit.)

Sample Job Description: Director of Monitoring and Evaluation (from ORBIS International)

ORBIS International is a nonprofit organization dedicated to saving sight worldwide. We provide the tools, training and technology necessary for local partners to assess their needs and develop workable and lasting solutions to the tragedy of unnecessary blindness.

Director of Monitoring and Evaluation

Job Summary

As a senior member of ORBIS program team, the Director, Monitoring & Evaluation provides organizational leadership and mobilizes the necessary technical assistance to develop and maintain an effective monitoring and evaluation system throughout ORBIS and its affiliates. She/he ensures that the information and analysis needs of various ORBIS departments and offices, the ORBIS International Board and the donors are met effectively by measuring the effectiveness and impact of all programs. This includes in country programs, the Flying Eye Hospital (FEH), Cyber Sight, and the Hospital based Programs (HBP). To ensure that ORBIS's M&E program is consistently implemented across the globe, she/he frequent travels to ORBIS's regional and country offices.

Reporting & Working Relationships

The Director, Monitoring & Evaluation reports to the Chief of Program, works in close coordination with HQ and regional directors as well as ORBIS's technical and clinical staff and supervises the New York based Monitoring & Evaluation staff.

Essential Job Functions

M&E Framework and Strategies

- Leads, designs and implements efficient organizational performance measurement systems that allow accurate, reliable information collection and reporting;

- Develops overall organizational performance measurement framework, linking conceptual models to program monitoring and evaluation and identifying strategies and models for replication;
- Ensures timely monitoring and that measurement of changes in program conditions are taken into consideration in planning, assessing impact and reporting on progress.

Capacity Building

- Ensures that the M&E team evolves and works effectively, setting and meeting its priorities;
- Informs the M&E team about new information, expectations, requests and instructions from the ORBIS Executive, Finance and Development departments;
- Provides technical guidance and support to ensure regional/country office performance is systematically monitored and data for key indicators are collected, analyzed and reported;
- Builds core competencies of the monitoring & evaluation field staff and project managers through training and technical assistance for accurate data collection and reporting;
- Leads guidance to regional, country program staff and partner staff in the design and implementation of outcome and impact studies.

Evaluation

- Guides, supervises and participates in joint evaluations. Oversees technical assistance for evaluation activities within regional / country programs and advises the Chief of Program on M&E related procedures and policies for ORBIS;
- Coordinates submission of electronic copies of all evaluations to ORBIS HQ intranet for sharing organization-wide;
- Ensures management responses to findings and recommendations of evaluations and audits are recorded and monitored for follow-up implementation;
- Coordinates effective dissemination of findings, conclusions, recommendations and lessons learned from evaluations, to intended audience as described in TOR, with a view to improving the program design policy and strategy and contributing to wider learning.
- Reviews TORs from the field, and maintains or has access to a database of consultants in various areas of specialty.

Other

Leads assistance in monitoring & evaluation for the FEH, HPB and Cyber-Sight units in the program department, to report their contribution to organization performance.

Participates in the organization's strategic planning process, specifically regarding program planning.

Collaborates with IT to review and alter our current data and reporting system as needed and to execute the Software Consultants' agreements.

Participates in special projects and performs additional tasks assigned.

Qualifications & Experience

Preferred candidates have Master's Degree in International Development, Public Health or Epidemiology or related area; minimum of 15 years work experience in international development and/or health care programming, with at least 10 years management and supervisory experience; previous M&E experience in a non-profit, consulting, or government agency; preferably in a leadership role, and a successful track record in designing effective M&E strategies and systems, and following-up with quality implementation;

Skills & Abilities

The ideal candidate possesses excellent planning, research, and analytical skills, attention to detail and the ability to work cost-effectively and efficiently; strong written and oral communication and presentation skills; Proven leadership ability and collaborative approach to finding solutions, achieving quality work, and delivering outcomes and materials on time in a changing, fast-paced, deadline-driven environment; the ability to develop and maintain positive relationships with professional contacts, resources and/or networks and relate to people with sensitivity, tact, discretion and professionalism; Strong computer skills and a working knowledge of statistical software. She/he is also able to travel 50% of the time, including international travel to developing countries.

ORBIS is an Equal Opportunity Employer and welcomes qualified applicants from diverse backgrounds.

Programs Sample Job Descriptions

Senior program management roles differ based on the extent of general management and operational skill and experience required. Often, at larger nonprofits, the vice president of programs position is similar to an executive director role in that it has responsibility for fundraising, program development and delivery, budget and team management, and public speaking and relationship management (see Vice President of Programs). At some smaller nonprofits, the senior program manager focuses solely on program management and does not have fundraising responsibilities. In contrast, some smaller organizations will configure a vice president of programs role that entails broad operational responsibility including human resources, and program evaluation and expansion across the entire organization, as in the Vice President of Regional Programs and Operations description.

Each sample job description is intended to be a jumping off point, and likely will need to be tailored to meet the particular needs of your organization. Feel free to use and tailor these descriptions for your needs.

Sample Job Description: Director of Programs

For this multisite and multiprogram organization, the director of programs has an externally facing role managing relationships in the community. There also is a heavy emphasis on team management and development, and establishing standards of performance across all programs.

Feel free to use and modify this sample job description to help you create one for your organization.

Sample Description

XYZ Nonprofit Director of Programs

Reporting to the Executive Director (ED), the Director of Programs will be responsible for the operational success of XYZ Nonprofit ensuring seamless team management and development, program delivery, and quality control and evaluation. In this newly established role, the Director of Programs will manage a growing staff of X. The Director of Programs will be the key external face of XYZ Nonprofit in the community.

Responsibilities

Leadership

- Cultivate existing relationships with vendors with the goal of ensuring sufficient space and resources, and access to services.
- Develop and implement strategies that will maximize the synergies among program areas.

Team Management and Development

- Develop and implement a system to evaluate the skill, experience, and professional development needs of all staff.
- Implement a professional development program to address employee experience and skill gaps.
- Work with staff to develop objective performance measurements across all sites, to ensure consistent, high-quality evaluation and goal setting for all employees.

- Instill a sense of accountability among team members by modeling tight oversight of individual and organization performance standards.
- Recruit, hire, and oversee training and orientation of all staff members.

Program Operational Management:

- Using the existing balanced score card and program dashboard, establish consistent, objective program performance standards of accountability.

Qualifications

This is an extraordinary opportunity for an individual with team management experience to grow and further develop a proven program. The successful candidate will lead programs, partner with the ED and work collaboratively with a high-performance management team.

Specific requirements include:

- Minimum of a BA, MA preferred
- At least 10 years of experience with three of those in a team management role
- Demonstrated success developing and evaluating program models, and selecting and successfully operationalizing innovative programs
- Proficient in using technology as a management reporting tool and experience working with information technology staff to develop and implement program evaluation systems
- Strong project management skills managing complex, multifaceted projects resulting in measurable successes and program growth
- Experience having worked with a high-performance, collaborative, constructive peer group
- Strength in hiring, recruiting, managing, developing, coaching, and retaining individuals and teams, empowering them to elevate their levels of responsibility, span of control, and performance
- Deep understanding of human resources, employee performance improvement plans, and corrective action policies
- Demonstrated results in managing through complex systems and proven experience negotiating win-win agreements
- Excellent verbal and written communication skills with exceptional attention to details
- Personal qualities of integrity, credibility, and a commitment to and passion for XYZ Nonprofit's mission

Sample Job Description: Vice President of Regional Programs and Operations

This small organization also has multiple sites, but the vice president, regional programs and operations role is broader than the director of programs role described above. In addition to managing multiple program managers, this role encompasses human resources, evaluation, and knowledge management.

Feel free to use and modify this sample job description to help you create one for your organization.

Sample Description

Reporting to the Executive Director (ED), the Vice President of Regional Programs and Operations will play a critical role in helping XYZ Nonprofit achieve its vision to provide high quality programs locally, eventually extending the use of its model nationally. The Vice President of Regional Programs and Operations will be responsible for a variety of significant activities including internal operations, oversight of two regions, human resources, site expansion, and program evaluation services. She or he will be instrumental in ensuring consistent and effective internal processes and communications in order to strengthen XYZ Nonprofit's programs and position the organization for continued success.

Responsibilities

Leadership of regional coordinators and expansion strategies

- Oversee the program operations and day-to-day leadership of XYZ Nonprofit's regional coordinators to provide them with management guidance, strategies for regional growth, and operational assistance.
- Assist in the hiring of new regional coordinators; conduct yearly performance evaluations of regional coordinators, and implement the appropriate professional development tools and training to maximize operational effectiveness and to ensure the achievement of employee goals and performance benchmarks.
- Coordinate and direct expansion strategies including hiring, training, and lead the new region identification process and site development start-up efforts; help build strategic partnerships in existing and new regions.

Strengthen internal operations and infrastructure

- Supervise all human resources policies and programs for XYZ Nonprofit including organizational planning and development, on-boarding, training, development, compensation and benefits, performance evaluation, and recruiting; provide clarity around roles, motivate senior managers, and facilitate effective team dynamics.
- Support the senior leadership team, regional coordinators, and staff to make consistent and progressive steps toward organizational and programmatic consistency and sustainability; effectively communicate work plans and priorities derived from the organization's strategic plan by partnering with senior leaders to follow through with coordinated accountabilities, objectives, and associated budgets.
- Enhance organizational excellence by establishing operational benchmarks, timelines, and resources needed to achieve strategic goals, proactively recommending and driving improvements as necessary; set standards for accountability and measurements of success.
- Oversee XYZ Nonprofit's evaluation activities including data collection systems, longitudinal evaluation, and all contracts and activities relating to program evaluation and measurement; communicate and prepare all data collection summary reports and evaluation updates for the ED, board of directors, and staff.
- Develop a knowledge management system that ensures maximum sharing of information and learning throughout the organization; create an environment whereby XYZ Nonprofit is known as a best-in-class learning organization.

Qualifications

- Bachelor's degree required, graduate degree preferred; at least 10 years of professional experience in a general management role, ideally in a rapidly evolving institution
- Highly organized and ability to wear multiple hats in an ambiguous, fast-moving environment; a driving force who manages toward clarity and solutions
- A successful track record in setting priorities, shaping processes, guiding investment in people and systems, and developing an infrastructure that creates a stronger and more efficient organization
- Thorough understanding of project management; able to work effectively under pressure to meet tight deadlines and goals
- A consummate team player with a flexible and creative approach

- Excellent communication and coalition building skills with an ability to balance, negotiate, and work with a variety of internal and external stakeholders; high level of knowledge and understanding, especially as it relates to program replication, connecting programs to funding, creatively generating other resources, and building strategic partnerships
- Personal qualities of integrity, credibility, and a commitment to XYZ Nonprofit's mission

Sample Job Description: Vice President, Programs

The vice president of programs of this organization oversees the general management of all program areas, which includes program development, delivery, and evaluation, as well as fundraising, budget setting, knowledge management, and all external relationship management.

Feel free to use and modify this sample job description to help you create one for your organization.

Sample Description

XYZ Nonprofit Vice President, Programs

The Vice President (VP), Programs will have overall strategic and operational responsibility for all program areas. The position will be a part of the senior management team that drives the overall strategy for the organization and represents XYZ Nonprofit on a local, regional, and national basis. With a program budget of \$2.5 million and a staff of X, the VP, Programs will initially develop deep knowledge of each project, program operations, and business plan, and will focus on the following three areas: program leadership and management, external relationships, and knowledge management.

Responsibilities

Program Leadership and Management

- Enhance, flesh out, and implement organizational vision as established in XYZ Nonprofit's Strategic Plan.
- Ensure ongoing programmatic excellence.
- Demonstrate consistent quality of finance and administration, fundraising, communications and systems; recommend timelines and resources needed to achieve the program goals.
- Attract, develop, coach, and retain high-performance team members, empowering them to elevate their level of responsibility, span of control, and performance.
- Work with staff to develop systems to ensure consistent, high-quality project management.
- Provide leadership in development of inter-team communication and cohesiveness, sustaining culture and supporting staff during organizational growth.

External Relationships

- Expand revenue generating and fundraising activities to support existing programs and the growth of XYZ Nonprofit; cultivate existing relationships and develop new funder relationships.
- Manage relationships with partner organizations.

Knowledge Management

- Develop the necessary systems, processes, and tools to better support the facilitation, collection, and sharing of knowledge that is generated by the programs.
- Develop dissemination system to share organizational learning with a broad range of communities.
- Ensure that key project outcomes and/or policy, advocacy, and legislation are evaluated and leveraged for maximum community and organizational impact
- Work collaboratively with the senior management team to integrate cross program activities and functions.

Qualifications

The VP, Programs will be thoroughly committed to XYZ Nonprofit's strategy and mission. All candidates should have demonstrated leadership, coaching, and relationship management experience and strong demonstrated success managing funder relationships.

Specific requirements include:

- **Program Leadership and Management:** This individual will have taken a hands-on approach in leading a variety of initiatives. The ideal candidate will have a track record of effectively leading a performance-based and outcome-based program and staff. She or he will have developed and operationalized strategies that have taken a program or organization to the next stage of growth.
- **Team Building and Development:** The successful candidate will have recruited, managed, and developed a strong team of staff, program/project managers, and development professionals. This individual will serve as a "player/coach" to motivate and mentor his or her team.
- **Exceptional Communication and Influencing Skills:** As a voice/advocate XYZ Nonprofit, the VP, Programs will have strong written and verbal communication skills. She or he will be a persuasive, credible, and polished communicator with excellent interpersonal and multidisciplinary project skills. This individual must work collaboratively with internal as well as external partners and other organizations, providing exposure for program impact in a variety of professional journals and other media outlets. Ideally, this person will have served as an effective spokesperson at the national level.
- Advanced degree, with at least 10 years of management experience

- Unwavering commitment to quality programs and excellence in organizational and project management with the ability to achieve strategic objectives, and manage a budget
- Strong demonstrated fundraising experience with the ability to engage a wide range of stakeholders including advisory groups, coalitions, forums, trade associations, foundations, corporate sponsors, and practitioner groups
- Ability to work effectively in collaboration with diverse groups of people
- Integrity, positive attitude, mission-driven, and self-directed with demonstrated passion for XYZ Nonprofit's mission and commitment to working collaboratively with a management team of senior professionals
- Solid judgment and apparent leadership skills
- A team player, who can interrelate and operate effectively with peers and other associates within a collegial, yet demanding, work environment
- An individual who is able to handle a variety of constituencies, manage multiple tasks simultaneously and thrive in a complex environment with multiple priorities
- Impeccable integrity
- Strong analytical skills; basic business intuition and common sense
- Strong work ethic

Related Sample Descriptions

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.

The email job announcement 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 nonprofit organization's name, its mission, the key responsibilities of the role, and what you ideally seek in a candidate.

Organization Overview Sample

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 overview provided by The Bridgespan Group that exhibits many descriptors helpful to qualified candidates considering a position with a nonprofit organization.

Sample Overview

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 reorganized 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.

Email Job Announcement Sample

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 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.

Sample Email Job Announcement

Subject: Seeking Executive Director of Investments

Dear Colleagues' Name,

The Children's Investment Fund (CIFF) currently has an opening for an Executive Director of Investments (EDI), 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.

Your Name

Your Contact Information

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