



# Sample Recruitment Process and Procedures and Screening Interview

## Introduction

This document summarizes the overall process and general procedures that the Agency uses to recruit Board members and officers, and to help identify committee members and other volunteers.

Process and procedures are endorsed by the Board of Directors, overseen by the Governance Committee and managed by the CEO. Process and procedures do not constitute policy and can be adjusted by the Governance Committee and CEO, as long as such adjustments are in keeping with Board-adopted policy.

## Process and key dates [based on a board election in January]

- Ongoing**
  - Governance Committee and Executive Director continuously identifies prospective candidates.
  - Governance Committee reaches out to key referral sources to suggest possible candidates.
- December**
  - Governance Committee:
    - a) reviews / adjusts the desirable knowledges, skills, experiences, and diversity and networks as stipulated in *Bylaws* and *Board Composition Policy*;
    - b) reviews term status of incumbents;
    - c) reviews incumbents and identifies gaps;
    - d) presents priorities to key constituencies (e.g., board, committees, staff, targeted referral sources) and invites suggestions.
- January**
  - Governance Committee conducts appraisal of incumbent board members and:
    - a) identifies those who are fulfilling their obligations and might be considered for an additional term;
    - b) identifies those who need personal contact to discuss their performance. (And then a representative of the Governance Committee conducts this dialogue.)
  - The Governance Committee reminds Board members and staff to identify prospective candidates and provide those names to the Committee.
  - At a board meeting(s), the Governance Committee engages the Board in a discussion about prospective candidates.
- July**
  - Governance Committee reviews all suggestions and prepares priority list of candidates for screening interviews.
- August – October**
  - Governance Committee conducts screening interviews for Board membership.
- November**
  - Governance Committee conducts interviews for officer positions.
- January**
  - Annual meeting of the Board for the purpose of electing Board members and officers in accordance with *Bylaws* and other relevant policies.

## **Screening interview for candidates you are considering for committee and Board membership**

1. Members of Governance Committee reach out to candidates, inviting them to discuss possible engagement with the organization. Governance Committee members clearly explain that this is not a solicitation for money. You may be meeting with people who have never heard of your organization – and that’s just fine. This is a chance to inform and engage people in a conversation.
2. **Management sends background information to all candidates**, for their review prior to the screening interview.
  - a. Information would likely include:
    - i. Agency capabilities brochure
    - ii. List of Agency volunteer opportunities including committee membership, Board membership, and other volunteer activities.
    - iii. List of Agency committees, specifying purpose of committee, as stipulated on committee description
    - iv. *(Perhaps sent out in advance. Or more likely, sent out after the preliminary discussion, once the individual expresses interest in the organization.)* Relevant policies including Board and Board member roles and limitations, Board and committee operations.
3. **Key points to cover in the screening interview** include:
  - a. **First review Agency process and purpose of this meeting.**
    - i. The Agency regularly reaches out to individuals and conducts these “getting-to-know-each-other” interviews. The purpose of the interview is to determine if there is a good match between the individual’s interests and expertise, and the Agency’s needs. During the interview, do not guarantee a position – on the Board or committees/task forces.
    - ii. Reports from these “getting-to-know-each-other” interviews are discussed at subsequent Governance Committee meetings. Then a representative of the Governance Committee contacts the individual as a follow-up.
    - iii. The Agency appoints committee, Board and volunteer opportunities in January and February of each year.
  - b. **Engage the individual in discussion** because this is the way to find out if the individual is a good match with the Agency. For example, ask such questions as:
    - i. Why did you agree to meet with us today? What do you know about our Agency? Why are you interested in this Agency?
  - c. Review the agency’s **values, mission and services**. It is important that candidates for committees and board membership share your organization’s values.
    - i. Talk about how your agency lives its values – whether the value is about reproductive choice, diversity, activism, equity, or whatever. Listen to and watch the reaction of the candidate.

- d. Talk about the major issues facing the Agency at this time. Share challenges and opportunities. Engage the person in a conversation about how they feel about these challenges and opportunities.
  - e. Talk about **how the agency uses volunteers**.
    - i. Review list of **committees** and their purposes.
    - ii. Review relevant policies.
    - iii. Specify typical **meeting schedule** and frequency of committees and Board.
  - f. **Review knowledges, skills, experiences, and diversity and network needs** that the agency has decided it needs for the new year.
    - i. **Explain to the candidate which knowledges, skills, experiences, and diversity and networks s/he would be expected to use on behalf of the Agency as a volunteer.** (Do not specify a particular position at this time.)
    - ii. **Ask the candidate** whether she / he would use the skill that you need on the Agency's behalf. (The individual may not want to use the skill that the Agency needs – so it is unlikely that the individual will be recruited to board membership at this time.)
4. **Close the meeting with the following:**
- a. Ask the individual to think about the discussion.
  - b. Indicate that the Governance Committee will meet to review the results of all its discussions with individuals.
  - c. Indicate that you will contact the individual within a month to follow-up about his/her interest and a position within the Agency.
5. **Debrief with the Governance Committee and contact the individual within a month to invite to serve on a specific committee or the Board** for the year beginning in January.
- a. If the invitation is for Board membership, remind the individual that s/he must commit to the relevant policies before being nominated for election in January; and, must use the previously-discussed knowledges, skills, and experiences that the Agency has identified of value for its work.

Note:

- Diversity includes but is not limited to gender, ethnicity/race, age, socioeconomics, faith, sexual orientation, etc.
- Networks include but are not limited to business, social, government, civic, professional, etc.
- Make sure that your organization has clarified its values. See examples of values at [www.simonejoyaux.com](http://www.simonejoyaux.com) (Resources / Free Library / Miscellaneous. Also included there is an overview of what values mean.