



**Center for
Economic Opportunity**

NYC CEO Program Management Forum Managing for Innovation Course

Session 4 | Leading People and Building Teams

April 12, 2013

Learning Objectives

- After completing this session participants will be able to:
 - Recognize eight basic steps in the hiring process
 - Build a candidate pool for upcoming openings
 - Identify what tasks can and cannot be delegated
 - Identify what person to delegate to an assignment
 - Identify and apply a four-step delegating cycle

Nonprofit Hiring

“...Little about management is more important than hiring well, since you never get great results without having the right people...”

“...The key determinant of success for most hiring processes is the quality of the candidates a manager has to choose from...”

Green and Hauser, *Managing to Change the World: The Nonprofit Manager's Guide to Getting Results*, 81.

Eight Steps of the Hiring Process

1. Building the Recruiting Team
2. Writing the Job Description
3. Developing a Candidate Pool
4. Screening Resumes
5. Conducting Successful Interviews
6. Checking References
7. Extending an Offer
8. Managing a New Employee's Transition

Nonprofit Hiring Toolkit, The Bridgespan Group
[www. Bridgespan.org](http://www.Bridgespan.org)

Building the Recruiting Team

- Why form a recruiting team?
- Who should be on a recruiting team?
- What are each team member's responsibilities?

Developing a Candidate Pool

- Benefits
 - Can help nonprofits fill positions quickly
 - Help cultivate people who will be able to step into leadership roles successfully down the road
 - Encourages the organization to think strategically about what skills will be needed

Selected Techniques for Building Strong Pool of Candidates

- Mass marketing
- Individual headhunting
- Finding connector sources
- Striving for diversity

Conducting Successful Interviews

- Begin in a manner that provides a comfortable atmosphere
- Interview for results; focus on what candidate may have achieved as it relates to the position
- Ask open-ended questions
- Probe for ability to manage and work in teams

Sample Talent List

Name	Current Organization	Possible Fits	Contact Information	Notes
Liz Williams	Citizens for a Better World	Senior communications role	lwilliams@cbw.org	Savvy, energetic, responsible for CBW's 2009 media blitz, strong interest in new media
Mindy Menendez	Schools Now	Operations, mid-level	mindy@schools.org	Strong critical thinker, likes creating and making systems work, great interpersonal skills, not sure about writing
Ali Tate	Health Care for Kids	Political director, campaigns, senior level	tali@healthcare.org	Powerhouse campaign organizer, committed to staying at HCK through election, then wants to move east

Sample Worksheet for Building the Applicant Pool

Job title: _____

Identify potential candidates and connector sources, or people who can put you in touch with other good applicants.

Categories to Draw From	Potential Candidates	Connector Sources
Your contact list	Sara Smith (RJ)	
Your current staff		
Former staff		Jesse Lee (SK)
Peer or pipeline organizations		
Other		

Assign someone to pursue each lead, and put their initials in the parentheses.

Sample Worksheet for Building the Applicant Pool

2. Brainstorm ways to mass market the job posting.

Mass Marketing Category	Places to Post Job Listing
Your own or allied organizations (websites, newsletters)	
Social networks	
Community or industry-specific listserves (idealist.org, indeed.com)	
Professional societies or associations (Association of Fundraising Professionals)	
Alumni/career services offices	
Other	

Green and Hauser. *Managing to Change the World: The Nonprofit Manager's Guide to Getting Results*, 102-103.

Delegation



Delegation

- Delegation addresses every manager's problem: too much to do...too little time
- Delegation fulfills every manager's responsibility to develop workplace competencies of his/her subordinates
- Delegation reveals capabilities and shortcomings of subordinates

Richard Luke and Perry McIntosh, *The Busy Manager's Guide to Delegation*. New York: AMACOM, 2009, 3.

What Tasks Can You Delegate?

- Simple tasks and decisions to entire processes and projects
- Tasks that your direct reports are capable of handling or could be trained to handle
- Entire tasks, not bits and pieces of jobs for one person to handle
- When it is too large for one person, assign it to a team with a team leader

Identifying the Right Person for the Job

Questions to ask:

- How well does the person understand the content of the assignment? Who is close to the problem?
- What is the skill level needed for this task?
- Who has the motivation for this work?
- How difficult and how important is this task?
- Who would benefit from this assignment?
- Who has the time?

How Can You Avoid Delegating to the Wrong Person?

- Be careful of the person who can't say no
- Be knowledgeable about the person's preferences for different types of assignments
 - Example: The art director may not be skilled in budgeting
- Review the work commitments carefully of the person who already has tight deadlines

EXERCISE:

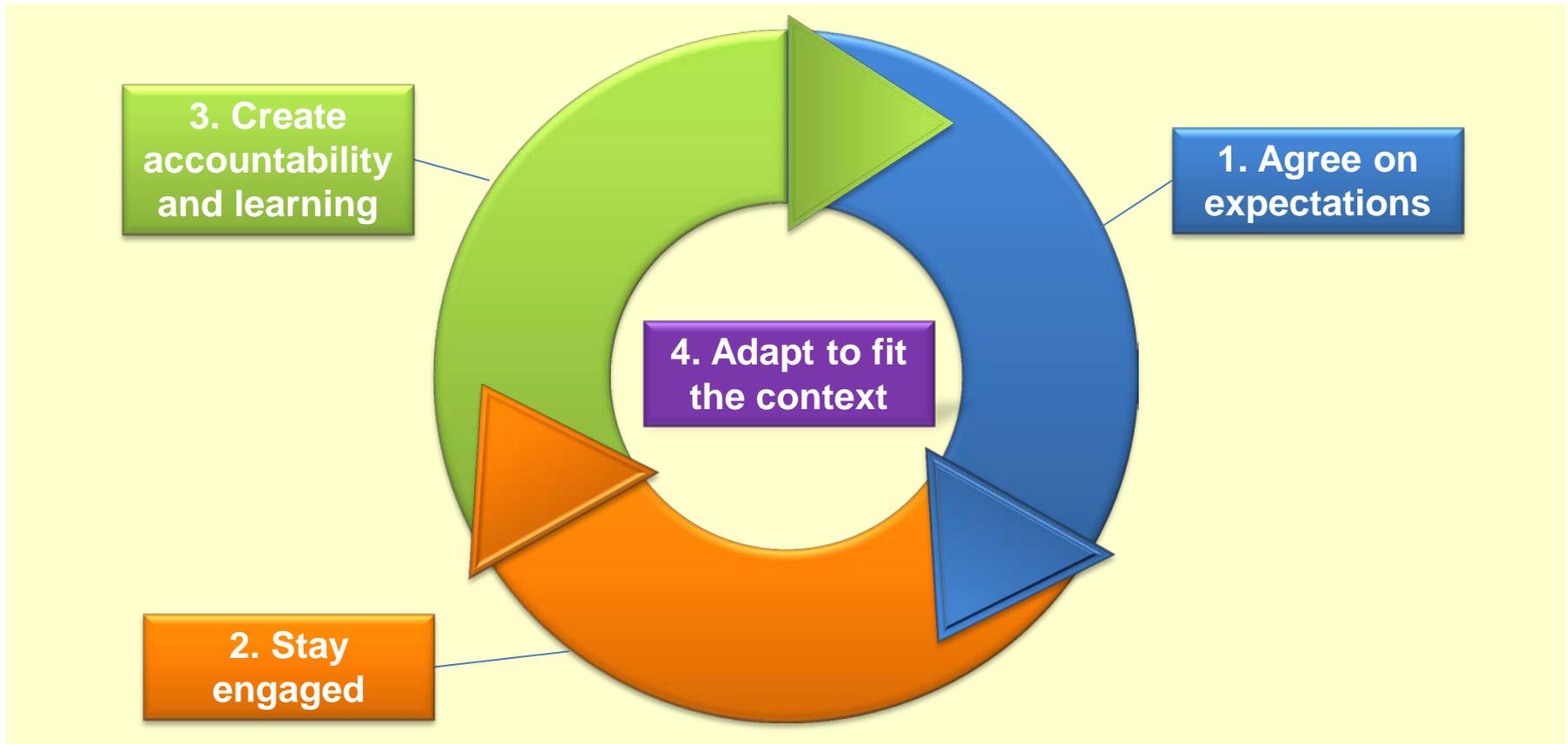
Tasks to be Delegated

- Working individually, fill in the tasks to be delegated worksheet by identifying who you would assign task 1
- When you and your partner have completed the list of tasks, discuss the response for task 1 on the worksheet. Give a rationale for your choice
- Your partner can do the same for his/her task 1 on his/her worksheet
- Proceed to discuss the second task and repeat process for all of the tasks

Sample Worksheet for Identifying Tasks Your Direct Reports Could Take On

Direct Report	Tasks I could delegate	Considerations	Comments
Cynthia	Organize and chair monthly progress report meeting	Understands the content Yes ___ No ___ Is close to the problem Yes ___ No ___ Has skill level needed for this task Yes ___ No ___ Has motivation Yes ___ No ___ Can handle the level of difficulty Yes ___ No ___ Can handle a task of this importance Yes ___ No ___ Has the time Yes ___ No ___ Would benefit Yes ___ No ___	

The Delegation Cycle



Green and Hauser. *Managing to Change the World: The Nonprofit Manager's Guide to Getting Results*, 11.

Step 1: Agree on Expectations

- What are you trying to accomplish or what does success look like?
- Who should be involved? Is this a one-person assignment or do you need a team?
- Where does the staff member go for resources?
- Why does it matter?
- How do you both approach the work?

Step 2: Stay Engaged

- Plan and provide for check-in meetings depending on the difficulty of the assignment and the skill level of the staff person
- Review a first segment of the deliverable
- When appropriate, observe your staff or go on jointly to meetings, activities

Step 3: Create Accountability and Learning

- Provide feedback, both positive and corrective, for assignments that have been delegated.
- Have a debrief meeting for each delegated assignment
- Ask for feedback from the staff who received the assignment

Step 4: Adapt to Fit the Context

- Review the questions/content areas you used in identifying the right person
 - Content of assignment; staff is close to the problem
 - Skill level needed for this assignment
 - Importance and difficulty of this assignment
 - Benefit from this assignment
 - Time available

Delegation Worksheet

Agree on Expectations

1. WHAT does success look like on this assignment?
2. WHEN is the project due? HOW does this fit with other priorities?
3. WHERE might the staff member go for resources?
4. WHY does this work matter, and why is this staff person the one to make it happen?
5. Are there any samples of work products, schedules, background information, etc., that you can provide to this staff person?
6. HOW will you make sure you and your staffer are aligned on key points and next steps?
 Verbal or written repeat-back Project plan Other

Stay Engaged

1. WHAT specific products or activities (for example, outlines, data, rehearsals) will you want to review or see in action to monitor progress?

Create Accountability and Learning

1. WHEN and HOW will you debrief how things went? Can you schedule that now?