

common good ventures

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Engaging Your Board Case Study: Augment the expertise of your ‘experts’ with the experience of all

Jeff, an HR director for a Northeastern insurance firm, served on the board of an agency dedicated to lobbying for preservation of local forestlands. The agency’s talented Executive Director, Linda, had had great successes in helping to get protective legislation passed in the state. However, she spent so much time in development and lobbying activities that she had no bandwidth to conduct and publish research, a critical function in supporting the organization’s mission.

In response, the board approved a new hire for the organization. However, Linda had no experience conducting interviews or reviewing candidates, but was hesitant to reveal to the board that she wasn’t “on top of it.” As a result, she tended to focus on her other responsibilities first and not prioritize the recruiting and interviewing process. At the next board meeting, when board members asked for a report on how the interview process was going, they were frustrated by the apparent lack of progress.

Joan, another board member, guessed that Linda might be facing challenges in the staffing process. In the same board meeting, she told Linda that it was apparent from all she had been accomplishing that she had been working very hard, and with great success. Then she asked Joan whether she could use some help, either in the form of time or expertise, in the hiring process. Relieved, Linda replied that she could use help with both.

The board asked Jeff to help Linda. He understood the human resource field and had a great deal of experience structuring and conducting interviews. Jeff, however, was facing a busy hiring season at work and had limited time on his hands. Furthermore, he wasn’t sure that he was the best equipped to judge exactly what skills the organization needed in a researcher. Looking around the room, he saw that almost every board member – a nonprofit executive, a finance expert, a market researcher, a management consultant, etc. – had an area of expertise that would overlap in some way with the new hire’s responsibilities.

In response, Jeff asked if each board member could think of two questions they would want asked of interviewees and two reservations they might have about a new hire. He suggested that board members e-mail their responses to Jeff and Linda within two weeks. Once responses were in, Jeff spent two hours with Linda reviewing what had been submitted and structuring an interview guide according to a template he had gotten permission to use from work.

As a result, Linda was not only more comfortable conducting interviews, but also felt that the board was there as a resource for her. At the next board meeting, Linda reported that she had asked five candidates to return for a second round of interviews. After reviewing each candidate’s areas of strength and skill gaps, she identified some important areas that the interview process was not addressing. The board agreed that these areas needed to be addressed.

During a discussion led by Jeff, it was decided that a case interview was in order: candidates would walk Linda through how they would tackle a given research project. Two board members volunteered to work with Linda in reviewing both the research project examples that she came up with and the criteria with which she would evaluate responses. Linda moved forward with these cases, and ultimately selected the candidate who emerged from the process as most qualified for the position.