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Acknowledgements

Thank you to the design team, whose valuable knowledge and insights shaped this course. The team consisted of:

Diane Maguire, Barbara Kimmel and Beth Rose-Kearns of Big Brothers Big Sisters of America and Wendy Foster, CEO Big Brothers Big Sisters of Massachusetts Bay. Content adapted with permission from Novations Talent Selection workshop.

This participant guide is part of the workshop that is required for Program Certification. While this guide contains the information for creating and conducting an interview process, it is not intended to be used without substantial practice during the workshop.
Goals

Making the right hire drives higher productivity, increased employee retention and a more harmonious workplace. In this session, you will learn how to:

- Create a well-rounded process that increases your employment success rate by looking at skills, cultural fit and passion for the mission.
- Customize and use standardized tools in support of the hiring process.
- Conduct a behavioral interview.

Process Overview

This outline provides a high level overview of an effective recruitment process. Throughout this training, we’ll explore how to execute each step in the process. You may find it helpful to also print and refer to the Quick Reference Card; click here to download.

Organization Diagnosis/ Prepare for Recruiting

1. Evaluate position (new, existing, existing with changes)
   - Identify stakeholders
   - Assemble interview team
   - Identify Success Factors: TOP
     - Talents
     - Organization
     - Passions
2. Create/Update job description and job profile
3. Determine correct exempt/non-exempt status

Sourcing and Recruitment

4. Recruit
   - Determine budget
   - Establish sourcing methods and dates
   - Decide on resources
5. Review resumes
   - Qualifying skills, experiences, interests: definite yes and maybe
   - Disqualifying (no comparable skills or experiences, employment gaps or tenure, poor grammar and errors): definite no
Screening
6. Develop technical questions: TOP
7. Create Realistic Job Preview
8. Conduct telephone screen with questions in three areas:
   ▪ Qualifying questions: basic ability to meet requirements
   ▪ Salary: most recent and what it would take to move to this position
   ▪ Technical skills: most important skills for this position (ex.: MS Office, customer service)
   ▪ If time and interest, provide RJP (if not, provide during interview)

Selection and Hiring
9. Plan and prepare for interview(s)
   ▪ Stage for best reflection of BBBS
   ▪ Use Interview Guide
   ▪ Select 3 – 4 competencies to explore with every candidate. Choose 1 or 2 questions for each of those competencies. Then, based on your notes from the telephone screening, identify follow up needed on 1 or 2 additional competencies for each specific candidate.
   ▪ Assign team responsibilities
10. Conduct team interviews (using Interview Guide)
    ▪ First interview
      ▪ Use competency questions
      ▪ Probe using SHARE
      ▪ Provide RJP if not provided earlier
    ▪ Second interview
    ▪ Reference checking
11. Rate candidates using Interview Guide and discuss
12. Make final 2 choices
13. Background checks
14. Extend offer
   ▪ Verbal first, then written
   ▪ Reference checks

Onboarding
15. Orientation
16. Desk and area set up
17. Objectives set (expectations, strategy, tasks, dates)
18. Training
19. Follow up and feedback
**Why This Process?**

A lot of hiring gets done based on nothing but a gut feeling—assumptions, intuition, varying definitions of words. And a lot of employee turnover results because that gut feeling just wasn’t accurate. Maybe that person you “really liked” turned out not to have the skills required for the job, or wasn’t able to keep up with the pace of your agency. Maybe he or she was easily stressed and so acted disagreeably with co-workers. He or she may not have been able to travel as required because they didn’t have a car, or it turns out they couldn’t work evenings or weekends because of childcare (these situations being areas you cannot directly ask about in an interview). Whatever the miss, the end result was most likely all of the following: lower morale, lost productivity, wasted time and money.

The processes you are going to learn will help you improve your chances of identifying how a candidate behaves in reality. It’s a process that starts with identifying success factors for the position; provides a method of identifying a candidate’s technical skills, behaviors, passions/motivators and fit with your culture; enables you to more reliably determine how a person will perform in the role; and gives you a way to objectively rate crucial components beyond your gut feeling.

The most crucial area of this process—the area we’ll be focusing on the most—is conducting a behavior-based interview. Research shows that behavioral interviews are said to be 55% predictive of future on-the-job behavior, while traditional interviewing is only 10% predictive. In addition, the EEOC recommends behavioral interviewing as a way to eliminate bias in hiring.

Behavioral-based interviewing provides a more objective set of facts to make employment decisions than does traditional interviewing. Traditional interview questions ask general questions such as "Tell me about yourself." Behavioral interviewing draws out specific situations, actions, feelings and learnings from a candidate’s past as demonstration of how they will behave in this job.

In a traditional job-interview, candidates can usually get away with telling you what he or she thinks you want to hear. Even when asked situational questions that start out "How would you handle XYZ situation?" the candidate has minimal accountability. How do we know, after all, if he or she would really react that way in a given situation? In a behavioral interview, however, it’s much more difficult for a candidate to give responses that are untrue to character. As the interviewer, you’ll be asking the candidate to describe specific situations, actions, feelings and results. If the candidate told a story that’s anything but totally honest, their responses would not hold up through the probing questions you ask.
Prepare for Recruiting

Defining the Job

Before you can hire the right person for the job, you need to clarify what the job involves. You also want to determine what will make a good "fit" between an individual’s skills and motivation and the requirements of the job and the organization.

This diagram illustrates the TOP areas to be evaluated for a successful hire – if there is an intersect / overlap of these characteristics, there is a higher probability of a successful hire.

When defining the job and the ideal person you need to fill the job, begin by asking the question, "What does the employee have to do in this job?" If you are looking to fill an existing position, you can often answer this question by reviewing the current job description. This is a prime opportunity to revisit the position and update the description.
If you are hiring for a newly created position or if a job description does not exist, you will need to spend time learning about the job function and talking with those who will interact with and/or rely on the person who holds this position.

Use TOP as your guide to ensure you cover all aspects:

**Talents**

**Education:** Determine if a specific educational background is truly necessary for the job. Sometimes you may find you can be flexible and substitute a certain educational background and degree with relevant experience.

**Experience:** Consider if you want someone with similar business experience, functional experience, large- versus small-organization experience, and non- vs. for profit experience. Note that similar business and functional experience are particularly important for public-facing positions requiring knowledge of services and similar providers.

**Knowledge and Skills:** Base the knowledge and skills requirements on a thorough analysis of the specific tasks and responsibilities the position entails. Distinguish between the type and level of skills that are absolutely critical for the job and those that are beneficial but not essential. Determine whether the organization can afford the time needed for on-the-job learning for a strong candidate who lacks some of the requirements.

**Organization**

In addition to thinking about candidate attributes that match the specific job requirements, you need to consider how a candidate will work in your organization as a whole. Think about how your organization is structured and try to determine what behavioral characteristics would be necessary to succeed in your workplace...

For example, is your organization hierarchical and formal or less structured and informal? Some candidates might not function well in an informal and less structured environment, while others may indicate that a limited structure fuels their creativity.

It’s also important to think about the culture of your organization. Culture defines an organization’s way of doing things, general values, and the ways in which people relate to one another. The culture of an organization displays itself in factors such as norms and values of the work group. It is important to recognize that we tend to select people who are like ourselves. It is even more important to recognize that this is something we need to work against if we hope to create a diverse workplace. That is why behavioral interviewing can help us.
Interview Guide

It gets us past the preconceived notions we might have that are unconscious. It helps us look more objectively at candidates. Think about the culture of your organizations and how you can be more welcoming to diverse populations of employees.

In addition, consider the following:

- **Analytical and creative abilities.** A candidate’s abilities in these two areas determine how he or she assesses problems and comes up with new approaches to solving them. Does the job need a problem solver, or someone who is comfortable working within established processes?

- **Decision-making style.** The way people make decisions is very individual. Some people are extremely analytical while others rely more on intuition. Some make decisions quickly, while others ponder them for a long time. Some depend on consensus, while others seek their own counsel. It is critical to determine whether a particular style is required for success in the job and, if so, what that style is.

- **Interpersonal skills.** Interpersonal skills and behavior are intimately connected; that is why understanding a candidate’s interpersonal skills is an important part of the hiring decision process. To determine which interpersonal skills are most appropriate for a given position, think about the set of tasks that will be performed in the position. Which traits would translate into good performance, especially in view of the superiors, peers, and direct reports with whom the person will interact? For example, an effective Customer Service representative might be organized and methodical, demonstrating detail-oriented behavior along with a desire to solve problems. For Fund Development roles, high extroversion and persistence might be desirable.

**Passion**

Consider what it is we do. A candidate’s goals, interests, energy level, and job progression often demonstrates his or her motivation. Always ask about and be on the lookout for clues regarding:

- What is it that motivates the candidate? Do your agency’s feedback, activities and compensation match the candidate’s needs?
- Learn what social concerns inspire the candidate to action. These can provide you strong indications of engagement with our mission and vision.
- Consider what it is that the candidate wants to do, where they see themselves in 3-5 years, how they wish to progress in an organization (upward, lateral, completely different path). Can you offer movement that matches the candidate’s goals?
Exempt or Non-Exempt?

As you create or update job descriptions, be sure to determine which classification the position falls into: exempt or non-exempt. The Fair Labor Standards Act governs job classifications that determine whether employees are eligible for overtime pay.

If the job you are hiring for has a different job description in any material way from the already evaluated program positions, you should seek counsel from a compensation expert regarding the proper classification. This will protect you from potential claims for back pay for overtime. Be aware that sometimes disgruntled employees go to the Department of Labor which then triggers an audit and your agency could be liable for back pay and penalties for all similar jobs if the job is not properly classified.

Here are the general tips; more detail can be found in Appendix C.

Non Exempt Classification

Employees covered under the Federal Wage and Hour Law that requires eligibility for the payment of overtime fall into this classification. This group includes secretarial, clerical and other support staff.

Exempt Classification

Executive, administrative or professional employees are classified as exempt based on the nature of their duties and responsibilities. While these employees are covered by the Federal Wage and Hour Law, they are exempt from some portions, such as recording actual hours worked and the payment of overtime.

As described by the FLSA there are several different groups of exempt employees; Executive, Administrative, Learned Professional and Creative Professionals, Computer Employees, and Outside Sales Employees, which are all also referred to as “White Collar” employees. Job titles do no determine exempt status. For each one of these exemptions a position must pass both the salary basis test and the duties test. The salary basis test requires that an employee be paid at least $455 per week or $23,660 annually.

Executive:

- Primary duty must be managing the enterprise, or managing a customarily recognized department or subdivision of the enterprise. and
- The employee must customarily and regularly direct the work of at least two or more full time employees. and
- The employee must have the authority to hire and fire other employees, or the employee’s suggestions and recommendations as to hire, fire, promotion or other changes in status must be given particular weight.
Interview Guide

Administrative:
- The employee’s primary duty must be the performance of office or non-manual work directly related to the management of general business operations of the employer or employer’s customers and
- The employee’s primary duty includes the exercise of discretion and independent judgment with respect to matters of significance.

Learned Professional
- The employee’s primary duty consists of performing work requiring knowledge of an advanced type in a field of science or learning customarily acquired by a prolonged course of specialized intellectual instruction.
- Primary duty includes the consistent exercise of discretion and independent judgment.

Creative Professional
- The employee’s primary duty must be the performance of work requiring invention, imagination, originality or talent in a recognized field of artistic or creative endeavor.

Computer Professional
- The employee must be employed as a computer systems analyst, computer programmer, software engineer or other similarly skilled worker in the computer field performing the duties described below:
  - The application of systems analysis techniques and procedures, including consulting with users to determine hardware, software or system functional specifications;
  - The design, development, documentation, analysis, creation, testing or modification of computer systems or programs, including prototypes, based on and related to user or system design specifications;
  - The design, documentation, testing, creation or modification of computer programs related to machine operating systems; or
  - A combination of the aforementioned duties, the performance of which requires the same level of skills.

For more information regarding the FLSA, visit the Wage and Hour Division’s website at www.wagehour.dol.gov
Defining the Stakeholders and the Team

As much as it is possible to do so, the process of finding the best candidate works better when there is a team involved in the interviewing process. This is because the new hire will surely work with more than just one person in your organization, and the needs must be heard and considered. Likewise, getting more than one person to talk with a candidate offers the ability to learn much more about a candidate. Lastly, a team approach allows the process to be divided up so no one person’s duties become unmanageable.

A suggestion for the hiring team members is shown below. Keep in mind that the higher the position level, the more people have a stake in the hiring process. This means that Director and higher positions may need to have the core team plus another stakeholder. However, creating too large a team can bog down the process and make it unwieldy to carry out.

<table>
<thead>
<tr>
<th>Core Team:</th>
<th>Other Stakeholders May Be:</th>
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<tbody>
<tr>
<td>HR</td>
<td>Peers</td>
</tr>
<tr>
<td>Hiring Manager</td>
<td>Direct Reports</td>
</tr>
<tr>
<td></td>
<td>Manager's Manager</td>
</tr>
<tr>
<td></td>
<td>Peer Manager (another agency department)</td>
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<tr>
<td></td>
<td>HR</td>
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</table>

Once the team is formed, tasks must be assigned. Below is a list of tasks and, when advisable, the recommended person who should be responsible for the task. Note that you may not need to do all the tasks on the list, and in some situations you may need to do alternate or additional tasks. This list will give you a good feel for the types of activities that help lead to a smooth and successful hiring process.

It is critical that there is one person assigned to owning the overall process; this is often HR. Everyone on the team should be committed to the importance of the process and should be held accountable for seeing their tasks through to completion.
### Example of Hiring Team Task List

<table>
<thead>
<tr>
<th>Task</th>
<th>Recommended Owner</th>
</tr>
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<tr>
<td><strong>Organization Diagnosis</strong></td>
<td></td>
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<tr>
<td>1. Define job requirements</td>
<td>HR with Hiring Manager</td>
</tr>
<tr>
<td>2. Write job description</td>
<td>HR with Hiring Manager</td>
</tr>
<tr>
<td>3. Sign-off on job description</td>
<td>Team</td>
</tr>
</tbody>
</table>

| **Prepare for Recruiting** | |
| 4. Create marketing recruitment plan | |
| 5. Determine recruiting methods (e.g.: Sourcing candidates and outreach) | |
| 6. Determine how candidates will apply | |
| 7. Create job posting for each media chosen | |
| 8. Point person to receive resumes and distribute to review team | |
| 9. Assign scheduler (candidate, interviewer and interview space or location) | |
| 10. Appoint or assign interviewers (phone and in-person) | |
| 11. Candidate assessment design | |

| **Sourcing and Recruitment** | |
| 12. Placing advertisements | |
| 13. Sourcing and Outreach | |
| 14. Retrieving and tracking responses | |
| 15. Schedule and stage interviews | HR or Hiring Manager |
| 16. Select competencies/questions for all candidates | HR or Hiring Manager |

| **Selection and Hiring** | |
| 17. Review resumes (screening) | Hiring Manager |
| 18. Telephone interview | HR and/or Hiring Manager |
| 19. First in-person interviewer(s) | Hiring Manager |
| 20. Second in-person interviewer(s) | |
| 21. Assessment of candidates | |
| 22. Reference and background checks | HR |
| 23. Verbal offer | HR |
| 24. Written offer | HR |

| **Onboarding** | |
| 25. Onboarding | HR, Hiring Manager, Related Manager, Peer Managers |
Developing a Job Description

Once you understand the position’s requirements, you are ready to create a job description. A job description outlines the responsibilities, tasks, reporting relationships, hours, and credentials needed. It will allow you to explain the job both to potential candidates and to any resources you might be using to help you identify candidates. In some cases, your organization may have a required format or standard job description to use as a model and you may need to have certain aspects of the description approved by HR. Your job description should include the following:

- Job title, business unit, organization
- Summary of the job, responsibilities, and objectives
- Hiring manager, reporting manager
- Status (exempt or non-exempt) hours, location
- Background (education, experience) required
- Technical Skills, knowledge and performance skills or competencies required

Remember, this is also an opportunity to redesign a job, not just to fill the current one. For example, the last person who held the position might have had a strong strategic focus, and you may decide you now need a more hands-on manager. Develop the job description accordingly!

On the next page is a sample Job Description, a systematic evaluation of the competencies required to perform the job successfully. It identifies both the performance and technical skills that are required for the position. The information found here will form the basis of other documents, ranging from job advertisements to Realistic Job Previews (RJP) to interview questions and rating scales.

Process note: The job descriptions we are referring to are the results of an extensive job analysis conducted by Novations, BBBSA HR staff and agency staff, who have identified competencies of high performing staff. Job descriptions for each Program function are on Agency Connection in the Leadership tab and Service Delivery tab for you to customize and use in your agency.
### JOB DESCRIPTION

<table>
<thead>
<tr>
<th>Position Title: MATCH SUPPORT SPECIALIST</th>
<th>Job Code:</th>
<th>Overtime Status: Exempt if all incumbents are paid more than 23,600 per year.</th>
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<tbody>
<tr>
<td>Department:</td>
<td>Location:</td>
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</tr>
<tr>
<td>Reports To:</td>
<td>Number of People Supervised:</td>
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**POSITION PURPOSE**

Essential to the BBBS brand, the primary function of this position is to provide match support to ensure child safety, positive impacts for youth, constructive and satisfying relationships between children and volunteers, and a strong sense of affiliation with BBBS on the part of volunteers.

Performance Measures: The successful incumbent will produce positive outcomes in the following areas: match closure rate, match retention rate, average match length, volunteer rematch rate, and customer satisfaction.

**ESSENTIAL DUTIES AND RESPONSIBILITIES (IN PRIORITY ORDER)**

- Continually assess the match relationship focusing on: child safety, match relationship development, positive youth development and volunteer satisfaction. Real and/or potential problems and barriers are identified, addressed and resolved as early as possible. Match support is provided on a frequency according to BBBS Standards, at a minimum.
- Assess and provide for individual training needs, information and support needs for each match participant to assure a positive youth development experience for the child, and successful and satisfying experience for the volunteer.
- Ensure high-level expertise in applying child safety and risk management knowledge, policies and procedures throughout all aspects of job function.
- Develop strategic interventions to identify and strengthen match relationships that require extra support to continue to grow.
- Develop, promote and implement individual and group match activities to support ongoing volunteer involvement with the child and agency affiliation through individualized recognition, annual events, and reengagement strategies.
- Effectively utilize P.O.E, to assess match impact on youth development.
- Conduct exit interview by phone with all parties at match closure. Assess reasons for match closure and re-match potential. When match terminates pre-maturely or unexpectedly refer exit interview to supervisor for third party assessment.
- Share with development and/or marketing staff potential partnership relationships as discovered through volunteers’ and parents’ employers and affiliations.
- Identify and promote re-engagement of volunteers as Bigs, board members, and donors in other volunteer capacities.
- Consult with other service delivery staff and/or supervisor as appropriate.
- To ensure quality services and measurable outcomes, maintain accurate and timely records for each match according to standards and utilize technology to report, synthesize and analyze data.
## EDUCATION & RELATED WORK EXPERIENCE

### Education Level:
*Minimum & preferred educational requirements necessary to perform this job successfully*

Minimum Bachelor's degree in social services, human resources or related field preferred.

### Years of Related Work Experience:
*Minimum & preferred related work experience necessary to perform this job successfully*

In lieu of BA, two years of related experience if under supervision of BA. Assessment and relationship development experience with child and adult populations; understanding of child development and family dynamics. Must have car, valid driver’s license, and meet state required automobile insurance minimums.

## SKILLS AND KNOWLEDGE

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<th>Required</th>
<th>Preferred</th>
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- Proficiency in Microsoft Office; including Word, Outlook, and Excel.
- Excellent oral and written communication skills reflecting solid customer service both in-person and telephone.
- Ability to form and sustain appropriate child, adult volunteer-based relationships based on positive youth development and volunteer satisfaction.
- Ability to effectively assess and execute the following relational support skills: guiding, supporting, confronting, advising and/or negotiating.
- Ability to relate well in multicultural environments.
- Ability to effectively collaborate with other volunteer match staff.
- Ability to use time effectively.
- Ability to focus on details.
- Ability to collect meaningful data and draw solid conclusions.

## TRAVEL REQUIREMENTS (LIST AS A % OF TOTAL WORK TIME)

- Routine office environment. Flexible work hours to meet customer needs. If home visitation is indicated, must travel to local communities and neighborhoods.
## Interview Guide

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<thead>
<tr>
<th>Core Competencies</th>
<th>High Performance Indicators</th>
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<tbody>
<tr>
<td><strong>Customer Focus</strong></td>
<td>Able to build strong working relationships with agency staff and matches; identify unexpressed customer needs and potential solutions to meet those needs; independently anticipate and meet customer match support needs; prioritize work in alignment with the needs of the match; use match knowledge and feedback to improve the effectiveness of own support results.</td>
</tr>
<tr>
<td><strong>Problem Solving &amp; Analysis</strong></td>
<td>Able to gather appropriate data and diagnose the cause of a problem before taking action; separate causes from symptoms; apply lessons learned from others who encountered similar problems or challenges; anticipate problems and develop contingency plans to deal with them; develop and evaluate alternative courses of action.</td>
</tr>
<tr>
<td><strong>Flexibility &amp; Achieving Change</strong></td>
<td>Able to positively deal with changes that affect job requirements or work assignments; adapt to shifting priorities in response to the needs of matches; quickly recognize situations/conditions where change is needed; remain calm and professional in emotionally charged interactions; work to clarify situations where information, instructions, or objectives are ambiguous; support organizational change.</td>
</tr>
<tr>
<td><strong>Continuous Improvement &amp; Gets Results</strong></td>
<td>Able to identify and apply &quot;best practices&quot; in own work; improve efficiency by planning and organizing work effectively, eliminating barriers and streamlining work processes; monitor, evaluate and track own performance; adapt work practices in order to meet goals and deadlines; persist in the face of ongoing obstacles or setbacks; accept responsibility for the quality and outcomes of own work.</td>
</tr>
<tr>
<td><strong>Decisiveness &amp; Judgment</strong></td>
<td>Able to demonstrate sound judgment in routine, day-to-day decisions; think critically to make decisions and take action, even in non-routine situations; rapidly make reasonable assessments with limited information; consider impact of various options when making decisions; use sound judgment in deciding whether to make a decision or escalate it to a supervisor for additional consultation.</td>
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### Open Communication

Able to use active and attentive listening to confirm understanding; coach others through the use of reflective questioning; personalize communication content and delivery to fit different perspectives, backgrounds or styles of audience; document information about matches clearly and concisely in order to keep records accurate and up to date.

### Strategic Alignment

Able to align own work objectives with the organization's strategic plan or objectives; take organizational priorities into consideration when making choices and trade-offs in own work; act with an understanding of how the community affects the business and how own actions and decisions affect other jobs or outcomes; maintain perspective between the overall picture and tactical details.

---

**Equal Employment Opportunity**

BBBS provides equal employment opportunities to all qualified individuals without regard to race, creed, color, religion, national origin, age, sex, marital status, sexual orientation, or non-disqualifying physical or mental handicap or disability.

**Americans with Disabilities Act**

Applicants as well as employees who are or become disabled must be able to perform the essential duties & responsibilities either unaided or with reasonable accommodation. The organization shall determine reasonable accommodation on a case-by-case basis in accordance with applicable law.

**Job Responsibilities**

The above statements reflect the general duties, responsibilities and competencies considered necessary to perform the essential duties & responsibilities of the job and should not be considered as a detailed description of all the work requirements of the position. BBBS may change the specific job duties with or without prior notice based on the needs of the organization.
### ACKNOWLEDGEMENTS

<table>
<thead>
<tr>
<th>Creation Date:</th>
<th>Revision Date:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supervisor:</td>
<td>I have approved this job description and reviewed with my employee.</td>
</tr>
<tr>
<td>Signature:</td>
<td>Date:</td>
</tr>
<tr>
<td>Employee:</td>
<td>I have reviewed this job description with my supervisor and acknowledge receipt.</td>
</tr>
<tr>
<td>Signature:</td>
<td>Date:</td>
</tr>
<tr>
<td>Human Resources:</td>
<td></td>
</tr>
<tr>
<td>Signature:</td>
<td>Date:</td>
</tr>
</tbody>
</table>
Planning and Preparing for an Interview

Making Diversity a Priority

As you consider recruiting sources and attempt to create a diverse candidate pool, be sure to consider the demographics of the population you serve, and reflect that appropriately in the staff that serves the population. It will best serve your community if your staff is inclusive of as many diverse populations as is possible.

Diversity is a crucial component of every aspect of agency operations. Diversity is about valuing every person for his or her uniqueness. It is about harnessing the full range (and potential) of the best mix of individual characteristics, backgrounds, cultures, and perspectives in achieving success in your agency. It is about breaking free from damaging stereotypes which limit our ability to see people as individuals—each with their own special gifts and talents. It is about being open to the benefits that a truly diverse staff can bring to your agency’s team effectiveness, creativity, and resilience. Diversity is about respect for others. Showing this respect does not require that we agree with others or adopt their values or beliefs. It means that we honor (and respectfully communicate) the value of differences; encourage cooperation and relationship-building within the context of diversity; and effectively use differences to build and nurture a high energy agency team.

Diversity is not a project or an event. It is not ultimately about regulatory or legislative compliance (although these are highly important). The goal of diversity is not counting people. It goes well beyond “tolerance and sensitivity”.

Diversity represents a long-term commitment and process which should fully integrate with all aspects of your agency’s operations. It requires strong, sustained and highly accountable leadership at the board and agency levels to succeed. As such, it is important to view diversity within a framework which your agency can use as you plan, communicate, implement and measure diversity success.

Diversity is the right thing to do. However, there is also a strong business case for it:

The communities in which we live, work and seek volunteers are changing. Our workforce is older, and is comprised of more females and members of ethnic minorities. In fact, females and minorities will continue to comprise the largest segment of new entrants into the workforce in the years ahead. Further, workforce growth in the United States continues to slow with our aging population—at the very time when the demand for well-educated employees in our increasingly knowledge-based, technology-driven economy increases. Well-educated workers from other countries will increasingly support this need.
In “Beyond Best Practices: New Strategies for Diversity Breakthroughs”, author Andres Tapia cites the following statistics:

- “In 1950, 90% of the U.S. was white. By 2040, less than 100 years later, only half of the U.S. will be white. We are already over half way through this demographic tsunami with 30% of the population being people of color.
- Hispanic and Asian populations in the U.S. will triple over the next 50 years.
- The purchasing power of minorities is already $1.7 trillion. $600 billion of this is Latino purchasing power, which is greater than the GNP of Mexico.
- By 2008, 70% of all new hires in the U.S. will be women and minorities.
- Due to the ballooning number of baby boomers retiring in the next decade and the much smaller size of Generation X after them, there will be 10 to 28 million jobs which will not be filled.”

In such a changing environment, the business case for diversity is strong and convincing:

- Diversity supports organizations in capitalizing on new customer bases or markets. Organizations that wish to succeed must increasingly reflect, understand and reach out to more diverse communities, customers and stakeholders.
- Diversity can improve the quality of an organization’s workforce. For most organizations, the cost of labor represents a significant (or most significant) component of costs. The ability of organizations to attract and fully leverage the productivity of this workforce is the key to success. At a time when our workforce is changing (and even shrinking), organizations which foster a strong sense of employee identification, motivation and commitment—as well as reduce unnecessary turnover, employee complaints, conflicts, and legal proceedings—will ensure sustained success and competitive advantage.
- Diversity can encourage greater creativity and energy within organizations. When differences are valued and encouraged, organizations can fully benefit from new ideas or approaches to solving organizational problems or challenges. Different perspectives can help an organization to vision the future in different ways. Different thinking styles can result in new services, products or applications of existing services. Diversity can help organizations to reach out to new constituencies or customers.
- Diversity facilitates organizational flexibility and adaptability. At a time when change is coming at us faster and faster, diversity can foster greater flexibility in organizations. That flexibility and ability to foresee, lead, and act on change may make the difference between mere organizational survival and success.
The business case for diversity is not simply a generic one, however. It is critical to the success of Big Brothers Big Sisters throughout the U.S. The 2007-2010 BBBS Nationwide Strategic Direction cites the following as a guiding principle in our plan:

“We promise to foster a culture of commitment to diversity and inclusion, partnership and collaboration, continuous learning, people development and high performance.”

Diversity and inclusion are not simply part of this culture. They help to drive more effective partnership, learning, development and performance within our agencies.

Our BBBS strategic direction recognizes that quality growth in the number of children we serve must be increasingly intentional—a more targeted approach to growth. Our success measures must be refined in order to reflect the demographics of the children and volunteers that we intentionally want to serve. While each community will develop its own goals for mix of children that the agency is dedicated to serving, our strategic plan sets out national targets for increasing the percentages of African-American and Hispanic youth served (and volunteers serving these youth) through our programs.

In order to serve more children, we must also strengthen our agency’s capacity for quality, sustainable revenue growth. This will require that our agencies reach out to an increasingly diverse mix of funders and partners within our communities. Our ability to more fully reflect and understand the communities we serve will significantly support our success in growing our ability to grow our respective agency revenue bases.

In order to ensure quality growth in children served and sustainable revenue growth, the BBBS strategic plan calls for increased focus on resource acquisition and development—particularly in areas of volunteer recruitment and fund development. Our ability to seek a diverse range of candidates for these roles will be crucial to our success in reaching out to our increasingly diverse communities.
Recruiting Promising Candidates

Accessing diverse, qualified candidates is critical to the success of your hiring effort. You will want to get the word out through as many channels as possible to increase the diversity and number of applicants in your candidate pool. However, you should also select targeted, relevant channels to ensure that the proportion of qualified candidates in your pool is as high as possible.

Next are some suggestions, organized into general cost categories. You may choose to use a combination of resources. Be creative!

**No Cost or Low Cost options:**

- Referrals from colleagues
- Referrals from Bigs
- Civic and Religious Organizations’ newsletters
- Professional associations
- Referrals from Board members
- Referrals from Corporate Partners
- Colleges and universities
- Your agency’s web site

**Moderate cost:**

- Newspaper ads
- Job fairs
- Recruitment web sites

**Higher cost:**

- General placement firms
- Specialized search firms
Screening Resumes

The cover letter and resume are the candidate’s first introduction to you, so the content should convey the qualities you are looking for. Note that e-mailed submissions may be less formal than traditionally mailed resumes or provided in a format specific to an online recruiting agency.

When you have a large number of resumes to review, use a two-step process to make your task more manageable.

In the first pass, eliminate the resumes for those candidates who clearly do not meet the education and experience requirements that you previously noted as being essential for performing the job. Examine specific aspects of the resume, such as:

- Signs of achievement and results; for example, quality orientation, stability, or career direction
- Progressive career momentum
- A career goal in line with the job being offered
- Overall construction and appearance of the resume, although this criterion may not apply to resumes submitted via an online form

In the second pass, consider the more subtle differences among qualified candidates. Then develop a list of the strongest candidates. When reviewing resumes, be on the alert for red flags and put these resumes to the side. Examples of things to watch for are:

- Obvious gaps in employment
- Typos and poor reproduction quality
- Limited tenure in multiple jobs
- No descriptions of results or accomplishments
- Frequent job changes

A Tip from the Mass Bay agency: We always email the candidate some materials before the phone screen: our mission statement, our beliefs and values, and a detailed job description. We have found this helps us to zero in on the TOP analysis during the telephone screening.
Interviewing

Overview of the interview process

A hiring interview has one primary purpose—to provide an opportunity for both interviewer and job candidate to obtain the information they need to make the best possible decision. Since the time spent with any particular job candidate is limited, a well-organized approach will help make the most of that time, yielding more and better information.

When selecting someone for an important position, you may go through all of the following stages. You’ll probably go through at least two to three of them for every job opening.

1. **Create an interview team.** As discussed on pages 12 - 13, be sure your team is inclusive of stakeholders but not so large that it is unmanageable.

2. **Telephone-screening interview.** You, the interview team, HR, or your department may conduct a telephone-screening interview. Its purpose is to confirm that the candidate meets the stated job qualifications using questions that identify skills and confirm salary match. It is also a good opportunity to confirm technical requirements and to get some initial impressions of the candidate: Does he or she call you back at the specified time? Communicate well? Do they ask good questions? Are they personable and professional?

3. **Initial in-person interview.** Try to narrow the field to no more than three candidates before holding an initial interview. This interview will probably last an hour. For less demanding positions, you may find out everything you need to know about the candidate in this interview. For positions with more responsibility, you will need to see the person again.

4. **Second interview.** Be very selective about which candidates are asked back for a second interview. This is the time to have the candidate meet with “clients”, direct and indirect supervisors, and peers. This interview will bring out more of the "real" person. For the final one or two candidates, schedule time to ask final questions, learn and answer their questions, and to sell the job and organization.

5. **Rate and offer.** The last step of the hiring process is to objectively rate the candidates, discuss and extend a job offer to the top candidate. Always aim for the individual who can contribute the most to your organization’s success.
Telephone Interviews

After screening the resumes and selecting the “definite yes” candidates, schedule a telephone interview with each candidate. The telephone screening interview should contain three main areas of discussion: qualifying questions, salary questions and skill probing.

Use the telephone interview time to ensure the candidate possesses the technical abilities and interests you need, as well as to ensure the candidate can actually perform the duties at the specified hours and so on. This is the time to qualify or disqualify candidates. Why now? Quite simply, by confirming that the candidate possesses the actual skills you need via the telephone, you are freed up to focus on the highly effective behavioral questions during the in-person interview.

1. Qualifying questions

These questions allow you to immediately determine whether or not the candidate meets the basic position requirements so you can decide whether or not to invest more time with them. Example qualifying questions are:

1. Why are you interested in this position, and BBBS?
2. For each current or previous position, ask the candidate: Why did you leave?
3. (If applicable) This position requires ___% travel; how does that work for you?
4. (If applicable) This position is home-based. Do you have a location in your home for a private office?

2. Salary Requirements

This is the best time to qualify or disqualify candidates based on salary requirements. Some candidates are coached to not discuss salary until after the interviews because if the hiring organization really wants him/her, the organization may come up to the candidate’s desired salary. Be firm in obtaining the candidate’s current salary and asking him/her what it would take to move to this position before you invest the time in interviewing. This discussion is necessary to ensure a win-win for all involved.

As an example, if your position has a salary range of $32 - $36,000 but the candidate is seeking a minimum of $48,000, you are probably too far apart to make it work. It therefore would probably be unproductive to continue with this candidate.
Interview Guide

Sometimes candidates will say they are flexible or open to negotiation regarding salary. If this occurs, you will need to stand firm to obtain their “move” amount to help ensure a “win-win” for all involved.

Two questions to ask are:

1. What is/was your final salary for your current position?
2. What are your expectations for salary to move to this position?

Lastly, be very cautious about your wording. Do not quote exact salaries or promise increases; it is better to talk about hiring ranges - or better yet, discuss how we try to be market competitive.

3. Skill Probing

The questions you ask during the telephone interview are tied to the items in the skills and knowledge area of the Job Description. Some example questions are below; select the one or two most appropriate or craft other technical questions about the skills you need to learn about.

<table>
<thead>
<tr>
<th>Skill/Knowledge</th>
<th>Questions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proficiency in Microsoft Office; including Word, Outlook, and Excel.</td>
<td>Can you give me some examples of work you’ve done in Word? Outlook? Excel? Have you had training on any of these tools?</td>
</tr>
<tr>
<td>Excellent oral and written communication skills reflecting solid customer service both in-person and telephone.</td>
<td>Give me an example of an extraordinary level of customer service you have provided?</td>
</tr>
<tr>
<td>Ability to form and sustain appropriate child, adult volunteer-based relationships based on positive youth development and volunteer satisfaction</td>
<td>Describe a time you formed a solid relationship with someone that resulted in changing their behavior.</td>
</tr>
<tr>
<td>Ability to relate well in multicultural environments;</td>
<td>Tell me about a time you faced cultural differences with co workers or friends. How did you resolve them?</td>
</tr>
<tr>
<td>Ability to use time effectively;</td>
<td>Tell me about a time you had to prioritize a variety of tasks and deadlines. How did you manage and decide on your priorities?</td>
</tr>
<tr>
<td>Ability to collect meaningful data and draw solid conclusions.</td>
<td>Describe a time when you analyzed data and drew conclusions. What process did you use?</td>
</tr>
</tbody>
</table>

A Tip from the Mass Bay agency: We provide our formal detailed job description for the candidate to review before the screen. Then during the screen, we probe for what appeals to the candidate in the written description and what questions they have about it. This has been very valuable to our process.
**Realistic Job Preview**

By communicating a realistic picture of your working environment now, you avoid miss-hires later. A Realistic Job Preview (RJP) is a way to describe the work environment, typical daily tasks and so on. It describes both the positive aspects and challenges of a job to help the candidate understand what the job is really like. An RJP can help candidates imagine what it would be like to work at BBBS and determine if it is a fit for them. It may cause them to self-select out of the interviewing process which prevents problems down the road. **If at the end of a telephone screen it appears that a candidate will not work for the position, do not use your valuable time giving a RJP. If you are short on time, you may want to use the face to face interview to give the RJP.**

Another benefit of using the RJP is that you will learn whether or not the candidate can fulfill the obligations of the job that you can’t legally ask about. For example, you cannot ask if the candidate has children or owns a car. But by using an RJP you can walk through a typical week, describing the need to be at the agency or another site until 8 pm some evenings, working weekends, needing to be at 12 different sites throughout the service area. **Do not give a written preview to candidates; this is for your eyes only. Giving a written preview could be construed as a legal promise or agreement.**

To create a RJP:

1. Identify typical factors about the job: work hours, places they will work, office environment, tasks, the different levels and types of people they will work with daily, etc.
2. Have someone who currently does the job write down what they do each day.
3. Combine the two by describing the work in behavioral terms, but do include both performance and technical skills. For example: **In this position, you would be doing as many as 6 telephone interviews a day, and each one has to sound like it is the only one. You’ll have a list of questions to ask and track the responses in our data system. So you’ll need to multi-task: actively listening to and interpreting what the person is saying and asking clarifying questions, interpreting and typing in their answers. You’ll need to listen for and address potential problems, gauging what is urgent and what can wait. The interview notes will need to be entered before you begin the next interview so you will have to schedule your time effectively.**

Shown next is an example RJP. After creating yours, you will use this as talking points to describe a typical “day in the life” for this position. **Again, the RJP should not be given to any candidate as it could be construed as a legal promise.**
Interview Guide

Realistic Job Preview Talking Points

Organization: Big Brothers Big Sisters of _____
Position: Match Support Specialist
Interviewer says: We’d like to give you an idea of what you’d be expected to do and what a typical work day is like to help you determine if this job is a good fit for you.

Interviewer describes each of the aspects below, looking for non-verbal clues and asking the candidate for their verbal reactions.

- **Team Dynamic:** In this agency, we take a highly collaborative approach. This means that we problem solve together, share challenges and issues and solutions. We have cubes set up so learning by listening over the wall often occurs, and spontaneous support after a difficult call is pretty common. Another example is that you would have a peer mentor to help you learn and grow. (What do you like/ or are unsure about in this environment? Can you give me an example of how you’ve group problem-solved in the past? Example of group learning?)

- **Supervisory partnerships:** This is a partnership. Supervisors and staff share problem solving responsibilities, action plan accomplishment and achieving objectives. This leads to very transparent, sometimes difficult conversations; examples are that supervisor and staff ask direct questions of each other, admit when help is needed or a mistake is made. This is a very similar dynamic to the role of an MSS – how you model supporting a match as a coach. We expect our MSSs to think and act creatively, to self-manage and produce instead of focusing on the administrative. (What type of supervisory experiences have you had in the past? What worked well and what didn’t?)

- **Job Performance:** It would be your role to be an advocate for these matches to produce great impact relationships for the kids. This job is a performance-driven environment with set goals and expectations that we expect everyone to meet. Some examples of those are to maintain a consistent level of remote support – telephone and internet or sometimes in secondary onsite activities, events and interventions. This means having about nine effective conversations each day (about 170 per month), where each one needs to sound unique. During these conversations, you’ll ask a lot of questions and listen intently to learn how well the match is going, how you can help it be even better, what challenges or issues are coming up. You’ll be expected to document everything into the database or files, like case notes – every one by the end of each day. With your team and supervisor, you’ll make strategies and plans for each match. In a limited amount of time, you’ll be expected to reach the main objectives – risk management and safety emphasis, youth development and affinity. (Tell me about previous work similar to this? What did you like about it? What didn’t you like?)
Improvement: We are always looking to improve the processes of how we’ve supported the match. We spend a lot of time talking about ideas for improving the quality, the match strength, how we provide support and how we can reward strong matches. In addition, you’ll have situations where parents won’t call you back, you can’t seem to reach the kids, the volunteer is having challenges, etc. So that’s another example of how you will problem solve and discuss your ideas with your team. (Have you had work experiences where people didn’t call you back? What did you do/how did you handle it?)

Hours: We have some flexibility in standard hours. In addition, this position requires being available until 8 or 9 pm a couple times a week, as well as one Saturday a month. We also expect everyone to participate in special match activities and events, probably one or two a month. (Would you be able to do this? Would it present any challenges for you?)

Wrap up: How does that sound? What concerns do you have, or what can I clarify for you? What did you like about what you heard?

A Tip from the Mass Bay agency: We created our RJPs by having each person in that role write down a description of a typical “day-in-the-life”. The supervisor uses these descriptions on the phone and in person to paint the picture for the candidate. During the interview, we also have the candidate observe and talk with someone in that role so they can determine if they can really see themselves doing that job.
Interview Guides

An interview guide helps you be consistent, focused, and fair in your interviews. It also helps you maintain control of the interview by asking appropriate questions to get at the information you need from each candidate. You can develop one general interview guide per job opening and then create individualized copies that contain each candidate’s information. During the interview, you can use the guide as a road map and place to take notes.

To create the Interview Guide, review the job description form as well as the candidate’s resume. Create a series of questions that enable you to learn about the candidate’s typical behaviors, work style and competencies. A successful method of obtaining this information is creating and asking questions in a format called JOBS.

JOBS is an acronym for remembering to keep the questions:

- Job-related
- Open-ended
- Behaviorally-based
- Skill definition-based

Note: Before you distribute interview guides to the team, have Human Resources and/or legal counsel review these guides to ensure that it does not include inappropriate questions. There is a list of questions you cannot ask later on in this module.

Interview Guides for Program positions can be found on Agency Connection under the Leadership tab and the Service Delivery tab.
Preparing for the Interview

You will be able to gather more of the information you need to make a good hiring decision, if you take the time to prepare for interviews. In addition, you’ll leave a better impression on the candidate if you are organized and efficient. This is important because the candidate is interviewing you too.

To prepare for an interview:

1. Create your introduction: yourself, the BBBS message, this position and your agency.
2. Ensure the interview space sets the right reflection of your agency.
3. Read the candidate’s resume and cover letter.
4. Select 3 – 4 competencies to explore with every candidate. Choose 1 or 2 questions for each of those competencies. Then, based on your notes from the telephone screening, identify follow up needed on 1 or 2 additional competencies for each specific candidate.
5. Customize the interview guide with the selected competencies and questions and take notes in it.
6. Know what your organization has to offer candidates and what the candidate is looking for to make a better match.
7. Practice your interviewing skills by role-playing with a colleague.
Phases of the Interview

The Opening

Your goal is to make the candidate feel comfortable and to set expectations about the structure of the interview. You will also want to briefly talk about BBBS mission, vision and structure. The opening should be no more than 10% of the allotted time.

There are several things you can do to set the right tone at the beginning of the interview.

- **Greet the candidate.** To put the candidate at ease, be warm and friendly. Introduce yourself. Smile, make eye contact, and shake hands. Include the candidate’s name in your greeting. If you are not sure how to pronounce it, ask. Be aware of cultural nuances.

- **Select a quiet, private meeting space that will not be conducive to interruptions.** Activate your voice mail or redirect your phone calls; do not take any calls or emails during the interview.

- **Make sure the candidate is physically comfortable.** In the interview space, show the candidate where to put his or her coat and where to sit. Offer the candidate a beverage.

- **Introduce yourself.** Explain your role in the organization and how it relates to the open position.

- **Explain the structure of the interview.** For example, you might say:
  - "I’m going to ask you about your experience."
  - "I’m interested in finding out about you as an individual."
  - "We’re interested in finding out whether there is a good fit between your interests and abilities and our organizational needs."
  - "I will tell you about our organization."
  - "I’ll be glad to take your questions at the end of the interview."
• **Establish rapport with the candidate.** There are several approaches you can use:
  
  o Acknowledge some of the difficulties or awkwardness related to being interviewed, such as meeting a lot of new people or being tired at the end of the day.
  
  o If you are the first to interview the candidate, ask how his or her commute was or how the directions to the building were.
  
  o Compliment the candidate on some aspect of the experience displayed in his or her resume.
  
  o Acknowledge that you have something in common, such as attending the same college or sharing an outside interest.

**The Body: Behavioral Questions**

During this phase, you gather the information you will need to evaluate the candidate by asking behavioral questions. You’ll use the **JOBS** questions that are written in your Interview Guide or that you created. To get specific examples of how this candidate works, you’ll do deep probing using the **SHARE** model. This part of the interview should be 80% of the allotted time, and the candidate should be speaking 80% of this time.

The highly effective questioning model we will use is called **SHARE**. The **SHARE** model is shown next:
Both research and common sense tell us that **the best predictor of how a person will perform in the future is how he/she has behaved in the past.**

**SHARE** provides a means for gathering evidence that a person has used the desired competencies and is likely to use them again in a similar situation. The method is sequential in nature and is repeated for each major accomplishment on the JOBS questions.

You begin with the **Situation**, ask about **Hindrances** or obstacles they encountered in the situation, probe about the **Actions** they took, what the **Results** were and their Evaluation of the outcome (what they learned from the experience). Below is a description of each step and examples of appropriate questions.

**Situation:** Provides a high-level “framing” of a situation.
- Identify recent situations where key accountabilities are demonstrated
  - “Tell me about a situation when you were particularly effective in your job as...”
- Obtain key events along the timeline
  - “What happened next?”
- Obtain the background
  - “What lead up to your getting involved?”
  - “How did you identify this need?”
  - “Take me back to the beginning...”

**Hindrances:** Used to identify what problems or challenges occurred during this situation.
- Ask them to explain the difficulties they encountered and why these were challenging.
  - “What obstacles/challenges/problems did you face?”
  - “Why were these difficult for you?”
  - “What effect did these problems have on your work?”
  - “How did you react/feel when these challenges came up?”

**Action:** Used to identify the candidate’s specific tasks/activities in this situation
- Ask specifics (on a behavioral level) to find evidence of competence. These are **thoughts**, **behavior**, **dialogue and feelings**.
  - “What did you do?”
  - “What did you say?”
  - “What were you thinking?”
  - “How did you feel?”

- **Getting thoughts:**
  - “Can you play back your thoughts?”
  - “What was going on in your mind when she said...?”
  - “What did you observe/perceive?”
Interview Guide

- Getting behavior:
  - “What did you actually do?”
  - “How did you react?”
  - “Who was involved?”
  - “What was your first step?” “What was your next step?”
  - “If I were there, what would I see you doing or saying?”

- Getting dialogue:
  - “What did you say to him/her?”
  - “Replay that discussion for me.”
  - “Do you remember exact words?”
  - “What did he/she say?” “How did they say it?”

- Getting feelings:
  - “How did you feel at that point?”
  - “What was your first reaction to that?”
  - “What was your attitude at this point?”
  - “What motivated you to...?”

**Results:** Ask questions to understand the outcome of the situation or accomplishment, whether that outcome was good or bad.

- “How did it all turn out?”
- “What was the final result?”
- “What impact did this have?”
- “What is the current status?”
- “How have things gone since?”

**Evaluation:** In this final step, you’ll ask questions to learn how well the candidate can assimilate information and experiences. It allows them to reflect on the situation so you can learn about their thinking process.

- “What did you learn about this situation?”
- “What would you do differently?” “Why?”
- “Would you take this opportunity again? Why?”
- “How would you approach a similar situation?”

Be sure to follow this process for each of the accomplishments or experiences on the resume that you want to learn more about. *Always be respectful of the candidate’s time, and keep it moving at the pace where you are sure to cover the most important questions.*
Inappropriate Questions

Protected class is a term used in United States anti-discrimination law. The term describes groups of people who are protected from discrimination and harassment. The following characteristics are considered "Protected Classes" and persons cannot be discriminated against based on these characteristics:

- Race - Federal: Civil Rights Act of 1964
- Ethnicity
- Religion or sect - Federal: Civil Rights Act of 1964
- Color - Federal: Civil Rights Act of 1964
- National origin - Federal: Civil Rights Act of 1964
- Age (40 and over) - Federal: Age Discrimination in Employment Act of 1967
- Familial status (Housing, cannot discriminate for having children, exception for senior housing)
- Sexual orientation (in some jurisdictions and not in others)
- Disability status - Federal: Vocational Rehabilitation and Other Rehabilitation Services of 1973 & Americans with Disabilities Act of 1990
- Veteran status - Federal Vietnam Era Veterans Readjustment Assistance Act of 1974
- Genetic Information - Federal: Genetic Information Nondiscrimination Act

It is, therefore, illegal to ask any question that directly or indirectly causes adverse impact, which occurs when a question, decision, practice, or policy has a disproportionately negative effect on a protected group. You cannot ask questions directly or indirectly regarding:

- Age/date of birth
- Religion
- Race
- Citizenship
- Physical attributes
- Sexual orientation
- National origin
- Marital status
- Children
- Day care arrangements
- Arrests
- Place of residence; own or rent
- Previous worker’s compensation claims
- Disabilities/physical ailments

U.S., federal, state, and local laws and regulations are clear about what questions are illegal; if you are not well-versed with these laws and regulations, consult your human resources specialist or legal counsel. For detail on what questions are impermissible and ramifications of candidate answers, see Appendix E. Examples of prohibited questions and legal ways to ask them are provided next.
Interview Guide

<table>
<thead>
<tr>
<th>Topic Area</th>
<th>Illegal to ask</th>
<th>Legal to ask</th>
</tr>
</thead>
<tbody>
<tr>
<td>Citizenship/Nationality</td>
<td>“Are you a citizen of the United States?”</td>
<td>“If hired, can you show proof of your eligibility to work in the United States?”</td>
</tr>
<tr>
<td>Marital Status / Children / Day Care Arrangements</td>
<td>“Do you have children that you need to bring to day care?”</td>
<td>“This position requires travel and work on weekends. Would you be able to meet these requirements?”</td>
</tr>
<tr>
<td>Religion</td>
<td>“What is your religion?”</td>
<td>“This job requires that you work weekends. Would you be able to meet this requirement?”</td>
</tr>
<tr>
<td>Disabilities/Physical Ailments</td>
<td>“Do you have any health-related issues that would prohibit you from doing this job?”</td>
<td>“This job requires that you lift 50 pounds. Are you able to meet this requirement?”</td>
</tr>
<tr>
<td>Age/Date of Birth</td>
<td>“How old are you?”</td>
<td>“If hired, can you show proof that you are at least 18 years of age?”</td>
</tr>
</tbody>
</table>

**Testing and Other Ways to Determine Competency**

You may choose to test the candidate for key skills required for the position if the test is job related and if it is EEOC approved. Testing can take many forms and is used to see the candidate in action – to confirm that they can do what they said they can do. **NOTE**: Make sure that if you test one candidate you test all candidates to avoid discrimination claims.

Testing can be done at different times, depending on what you are testing and how you will conduct the tests:

- **After the telephone interview but before the first in-person interview** if you have test scripts that can be emailed or you have arrangements with a third party testing service. If you test at this time, be prepared to share the results with the candidate during the in-person interview.
- **At the end of the in-person interview** if your test tools have to be accessed from within your agency’s office and computers.
- **During the second interview** to help make final decisions about candidates.

Testing examples include:

- **Spanish or other language fluency**: have them translate materials or spoken conversations.
- **Computer skills**: script out tasks to complete in the main applications used on the job (like MS Office Outlook, Word, Excel).
Interview Guide

Other Ways to Evaluate Competencies:

- **Comprehension and assimilation**: have them read a brief training or other documentation piece and discuss with you the key points, what their actions would be, etc.
- **Presentation skills (or related)**: ask the candidate to prepare and present a short presentation to demonstrate their skills.
- **Writing Skills**: have the candidate write something for you: a letter thanking a donor, communicating instruction of some sort, match notes.
- **Verbal communications and assessment skills**: have the candidate call a “volunteer” using the match support (or related) templates, where the “volunteer” is actually an agency employee.

**The Close**

During the close, wrap up the interview and explain the remainder of the hiring process. Less than 10% of the allocated time should be spent here. The table below outlines what the close entails.

<table>
<thead>
<tr>
<th>Do the following</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Ask if the candidate has anything else to add.</td>
<td>&quot;Is there anything else you wanted to tell me about that I did not give you a chance to discuss?&quot;</td>
</tr>
</tbody>
</table>
| • Ask if the candidate has questions or if there is anything that hasn’t been covered or that is unclear. | "I see our time is almost up. Before we close, is there a question or two I might be able to answer for you?"
| • Explain how and when the candidate will hear about follow-up interviews or a decision. | "We will review all of the information and be in touch with you by (date)."
| • Provide the candidate with your business card. Invite the candidate to call you with further questions. | "Here is my business card. Please feel free to contact me if you have any other questions." |
| • Promote BBBS! Remember to target the positive nature of our purpose that would appeal to the candidate. | "I hope you'll strongly consider BBBS. As the leader in child mentoring, we are really impacting the lives of children and our community."
| • Thank the applicant. Shake hands and make eye contact. Walk the candidate to the door or to his or her next destination. | "Thank you for your time and for helping us to learn more about your experience. I believe you are meeting with Stan next. Let me walk you to his office." |

Some candidates may ask questions about salary or benefits at this stage. It is best to provide a brief overview at this point, pointing out that details will be provided if an offer is made.
Important Interview Tips

Keep the interview focused

- If the candidate gets off track in answering a question, gently steer him or her back to your topic. Use phrases such as, "You were saying earlier..." or "tell me more about..."

- Actively listen. Focus on what the person is saying and withhold judgment.

- Regularly summarize what you hear to: confirm what has been said; make transitions between topics; and limit the comments of a wordy candidate. Example: "Are you saying that there was a six-month period when you were supervising 20 people in two different departments? That must have been difficult. How did you stay organized and on top of what was happening?"

Encourage the candidate to talk

- Encourage the candidate to talk by smiling, nodding, and leaving pauses before you jump in with a comment or another question.

- Ask follow-up questions that lead to more elaboration and specific examples of key information about the candidate.

- Use the candidate’s response in your follow-up questions.

- Use open-ended questions that incorporate terms such as "how," "why," "can you describe," and "tell me about."

Monitor your reactions

- Avoid reacting negatively to what the interviewee has to say—otherwise he or she will not respond as candidly to future questions.

- Know your own biases and try to control their influence.

- Understand that your first impression may change as the interview progresses. Some people make a great impression in the first few minutes, yet become less impressive as they talk more. Other people are nervous or slow to warm up, and their strengths take longer to emerge.

Take notes

- Do take notes, but be unobtrusive about it.

- Tell the candidate up front that you will be taking notes.

- Remember that your notes will become part of the employee file. Avoid writing anything down that could be construed as inconsistent with equal opportunity employment laws.

- Take time between interviews to write down any additional notes or observations while they are still fresh in your mind.
Evaluating the Candidates

It is critical that the evaluation process is as objective as possible. Certainly your instincts play an important role and those should be used as the “measure behind the data”.

This means that a best practice is to first identify, based on data, how many of (and how well) the job and organization requirements match those of the candidate’s skills and experiences. The Interview Guide should contain a rating system that provides an area for each interviewer to rate each candidate’s skills in those areas.

Consider how well the candidate would work in the organization? In the role? Be sure to talk with everyone who participated in the interview process to get their thoughts about the candidate in this regard. Tip: use the TOP diagram found on page 5 as a way to organize the information and determine how much alignment exists. The closer the alignment in all areas, the better the chance of a successful hire will be.

Rating

Next review the last page of the Interview Guide, where each interviewer rates each candidate in the major areas.

Each interviewer should first review their notes, then mark their assessment immediately following the interview. The hiring manager or HR staff should collect these and facilitate a discussion about each candidate before determining the next step.

The two columns shaded in gray are the target areas; the more checks placed in these columns the better the fit between the job and the candidate.
### Interview Guide

#### Step 1: Rate Each Competency and Skill

After reviewing this candidate’s responses, have each interviewer rate each competency they observed by placing a checkmark in the column that best describes their observation of the competency.

<table>
<thead>
<tr>
<th>Job Title: Customer Relations Specialist</th>
<th>Candidate:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date:</td>
<td>INTERVIEWER(S):</td>
</tr>
</tbody>
</table>

**Rating Anchors:**

- Very strong evidence skill NOT present
- Strong evidence skill NOT present
- Some evidence skill IS present
- Strong evidence skill IS present
- Very strong evidence skill IS present
- Insufficient evidence for or against skill

**Competencies**

<table>
<thead>
<tr>
<th>Attention to Detail</th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer Focus</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Flexibility and Achieving Change</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Get Results</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Influencing</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Planning and Organizing</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Relationship Building</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Strategic Alignment</td>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

**Technical Skills**

<table>
<thead>
<tr>
<th>Add Technical Skills Here and Rate</th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
</table>

#### Step 2: Total Ratings

Add the number of checkmarks in each column and write the total in this row. Candidate with highest total in gray columns shows strongest match.

**Challenges that Candidate May Have on the Job that We Should Probe Further.**
**Biases to Watch Out For**

Even though you may take a structured, methodical approach to evaluating your candidates, the evaluation process still, in the end, has subjective elements to it. Being aware of common mistakes can help you remain as neutral as possible. Try to avoid:

- Mistaking a quiet, reserved, or calm demeanor for lack of motivation
- Mistaking the person’s ability to play "the interview game," or his or her ability to talk easily, for intelligence or competence
- Allowing personal biases to influence your assessment; you might be tempted to judge the candidate harshly or discredit the opinions of your team members because the candidate reminds you of someone you dislike
- Looking for a friend or for a reflection of yourself in the candidate
- Assuming that graduates of certain institutions or former employees of certain organizations are automatically better qualified
- Giving too much weight to familiarity with the jargon of your business
- Focusing only on one or two key strengths and overlooking the absence of other key characteristics
- Failing to value motivation to get ahead
- Ignoring feedback from team members and looking at the candidate from your perspective only
- Weighing the impact this person will have on your position, such as improvements to processes that may impact your job
Background Screening and Checking References

Background screening should be done on a candidate before an offer is extended. Once you have identified your top candidates do the background check immediately. If adverse information is revealed through the background screen, send the candidate a letter by overnight mail advising him/her of the adverse results and giving him/her five days to respond. Sample letters are shown next:

**Sample Letter 1: Pre-adverse Action Letter**

(Date)

(Name)

(Address)

(City, State Zip)

Dear (applicant’s name):

A decision is currently pending concerning your application for employment at Big Brothers Big Sisters of (agency). Enclosed for your information is a copy of the consumer report that you authorized in regard to your application for employment, together with a “Summary of Your Rights Under the Fair Credit Reporting Act.”

If there is any information that is inaccurate or incomplete, you should contact me within five business days so we can make an informed employment decision.

Sincerely,

(name, title)
Sample Adverse Action Letter
(on letterhead)

(Date)

(Name)
(Address)
(City, State, Zip)

Dear (applicant’s name):

We regret to inform you that we have found it necessary to reject your application for employment.

This action was influenced by information in a consumer report made, at our request, by (name of credit reporting agency, address, and phone number of agency).

(Name of credit reporting agency) did not make the adverse decision and cannot provide the reason for the decision.

You may obtain a free copy of the report within 60 days, and you have the right to dispute the accuracy of the information with (name of credit reporting agency).

(Agency representative signature)

Enclosures: Report, “Summary of Your Rights Under the Fair Credit Reporting Act”
Reference checks verify claims made by the candidate during the interview process and fill in information gaps. They can also provide valuable outside perspectives on the candidate and their potential fit with the position.

Check references near the end of the process when you are close to making a selection decision. If you have not already discussed this with the candidates, be sure to obtain permission to avoid affecting someone’s current employment.

It is normally best to use the telephone to check references. When checking references:

- Take a little time to build rapport with the reference.
- Briefly describe the job that the candidate is applying for.
- Beware of the legal ramifications of asking and answering inappropriate questions.
- Ask about the candidate’s style, character, strengths, and weaknesses.
- Ask tough questions and follow up with detailed probes.

Next are some examples of effective questions to ask:

*Questions to ask for every reference check:*

1. In what areas do you think the candidate performs well?
2. What key transition challenges do you think the candidate may have coming into this position?
3. What are some developmental areas for the candidate?

*Additional questions*

- **Job Performance**
  - What were the candidate’s major responsibilities in the position?
  - What do you think of as his/her functional strengths?
  - What was his/her greatest accomplishment in that role?
  - In what areas might he/she need to further develop or improve functional skills?
  - How would you compare his/her functional expertise to others in the same or similar positions?
• **Management/Leadership**
  - How would you describe his/her management/leadership style?
  - How does he/she motivate and develop others?
  - What would his/her subordinates say about him/her as a manager/leader?
  - Has he/she led project or other teams where he/she managed through influencing versus formal line authority? If so, what worked well or not? Why?
  - How does he/she manage conflict? Handle stress?
  - If you could coach him/her on ways to improve, what suggestions would you make?
  - How does he/she compare to other managers in your organization?

• **Reason for Termination**
  - How and why did he/she leave your organization?
  - Would you rehire him or her? Why or why not?

• **Suitability for the position**
  - If you could design the ideal role for him/her, what would it be?
  - Do you see the BBBS role a good fit for the candidate? Why or why not?
  - What do you think will be the greatest challenge for him/her in this role?

• **Summary**
  - Is there anything I missed or that you’d like to add to help us assess the candidate more fully?

**Making the Decision and Offer**

Resumes, interviews, and reference checks all inform the decision-making process. At some point, you must ask yourself, "Do we have sufficient information to make a decision?"

If the answer is "yes," you are ready to make the hiring decision. Rank your top candidates and make the offer to the top-ranked candidate.

If the answer is "no, we have insufficient information," then ask yourself these questions:

- "What additional information do we need to make a decision?"
- "What uncertainties can we reasonably expect to reduce?"
- "Do the candidate’s strengths outweigh his or her weaknesses?"
- "What can be taught on the job or developed with formal training?"
Handle the remaining uncertainties to the extent that time and cost constraints permit. You may call some candidates back for another interview, or you may get additional team members involved in the process. Then, move to a decision.

**Making the Job Offer**

Be sure you understand your organization’s policy on who makes the job offer. In some organizations, the immediate supervisor or manager makes the offer. In others, the human resources department makes the offer.

Job offers are usually first made in person or by telephone. Be sure to:

- Make the offer with enthusiasm.
- Make the offer personal by referring to something positive that you recall about the interview.
- Continue to gather information from the candidate regarding his or her concerns, the timing of the decision, and other organizations he or she may be considering.
- Provide a time frame for the offer so that the candidate knows how much time he or she has to respond.

**The Offer Letter**

After extending a verbal offer, you should also send an offer letter. An offer letter is an official document, so be sure to seek advice from the appropriate channels before sending one. Include important facts in the letter, such as:

- Starting date
- Job title
- Reporting to
- Hours of work (for non-exempt employees)
- Compensation
- Benefits summary (typically an addendum)
- Acceptance due date

Sample offer letters are provided next.
Dear NAME:

We are delighted to offer you the position of POSITION reporting to SUPERVISOR NAME AND POSITION. As agreed, your official start date will be DAY, DATE. AGENCY PERSON will be in touch with you to arrange for your on boarding session. Below are the details of this offer:

- Your annual salary will be AMOUNT. Your salary will be paid on a ___ basis and subject to deductions for taxes and other withholdings as required by law. You will be classified as an exempt employee. As an exempt employee you are expected to work the hours necessary to achieve your position. You and (Supervisor) should agree on a regular office schedule. You will be eligible for a prorated merit increase effective ________.
- After successfully completing ___ days employment, you are eligible for ___ paid vacation days, ___ personal days and ___ floating holidays prorated to your start date. After successfully completing your ___ month introductory period, you are eligible to participate in our ______ (pension or 401k plans as applicable).
- You are eligible to participate in each of our excellent benefit programs after meeting the individual plan wait times. We have previously sent you the brief summary of these plans, their waiting periods and the plan costs. Your health plan benefits will begin on the first day of the month following your start date. If you have any questions about these benefits please call our benefits specialists at ____________________.
- Attached is an employment eligibility verification form. The Form I-9 must be witnessed in person, and completed within three days of your start date. Please bring the required identification and the form to sign when you arrive. If this form is not completed within three days of your hire date, we are required by law to send you home until you produce the required documents.

This offer is contingent upon the results of your background check. Your employment with (agency) is at-will. You may terminate employment with (agency) at any time, and (agency) retains a similar right.

To accept this offer of employment, please sign and date a copy of the letter and return it to me by _____. You may retain the other copy for your files.

Welcome to (AGENCY). We are delighted to have you join our team and become part of our mission to change the way children grow up in America. We know that you will make a significant impact on the lives of children through your work.

Sincerely,

(name)

(title)

cc: VP NAME

SUPERVISOR NAME

Accepted:

Signature Date

Name Date
DATE (Agency Letterhead)
NAME
ADDRESS
CITY, STATE ZIP

Dear NAME:

We are delighted to offer you the position of POSITION reporting to SUPERVISOR NAME AND POSITION. As agreed, your official start date will be DAY, DATE. AGENCY PERSON will be in touch with you to arrange for your on boarding session. Below are the details of this offer:

- Your annual salary will be AMOUNT based on a ___ hour workweek. Your salary will be paid on a ___ basis and subject to deductions for taxes and other withholdings as required by law. You will be classified as a non-exempt employee and as such, must receive supervisory approval prior to working hours beyond your regularly scheduled hours. You will be eligible for a prorated merit increase effective ( ).
- After successfully completing ___ days employment, you are eligible for ___ paid vacation days, ___ personal days and ___ floating holidays prorated to your start date. After successfully completing your ___ month introductory period, you are eligible to participate in our employer paid pension plan.
- You are eligible to participate in each of our excellent benefit programs after meeting the individual plan wait times. We have previously sent you the brief summary of these plans, their waiting periods and the plan costs. Your health plan benefits will begin on the first day of the month following your start date. If you have any questions about these benefits please call our benefits specialists at _______________.
- Attached is an employment eligibility verification form. The Form I-9 must be witnessed in person, and completed within three days of your start date. Please bring the required identification and the form to sign when you arrive. If this form is not completed within three days of your hire date, we are required by law to send you home until you produce the required documents.

This offer is contingent upon the results of your background check. Your employment with (agency) is at-will. You may terminate employment with (agency) at any time, and (agency) retains a similar right.

To accept this offer of employment, please sign and date a copy of the letter and return it to me by DATE. You may retain the other copy for your files.

Welcome to (AGENCY). We are delighted to have you join our team and become part of our mission to change the way children grow up in America. We know that you will make a significant impact on the lives of children through your work.

Sincerely,

Name
Title

cc: VP NAME
SUPERVISOR NAME

Accepted:

Signature Date

_________________________ ______________________
Name Date

Non-Exempt Offer Letter Sample
## Implementation Planning

<table>
<thead>
<tr>
<th>Planning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review workshop materials and notes; identify which pieces you will use</td>
</tr>
<tr>
<td>Determine who needs training on the process and create plan for all</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Prepare for Recruiting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Evaluate position (new, existing, existing with changes)</td>
</tr>
</tbody>
</table>

  **Identify stakeholders**

  **Assemble interview team**

  **Create/update job description and job profile**

<table>
<thead>
<tr>
<th>Sourcing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Establish diverse sourcing methods and dates</td>
</tr>
</tbody>
</table>

  **Screen resumes**

<table>
<thead>
<tr>
<th>Screening</th>
</tr>
</thead>
<tbody>
<tr>
<td>Develop technical questions: TOP</td>
</tr>
</tbody>
</table>

  **Create Realistic Job Preview**

  **Conduct telephone screen using Qualifying, Salary and Technical skills questions**
### Behavioral Interviewing
Select JOBS questions (using Interview Guide)

Rate candidates using Interview Guide and discuss

<table>
<thead>
<tr>
<th>Selection</th>
</tr>
</thead>
<tbody>
<tr>
<td>Make final 2 choices</td>
</tr>
<tr>
<td>Extend offer</td>
</tr>
<tr>
<td>Verbal first, then written</td>
</tr>
<tr>
<td>Reference and background checks</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Onboarding</th>
</tr>
</thead>
<tbody>
<tr>
<td>Orientation</td>
</tr>
<tr>
<td>Desk and area set up</td>
</tr>
<tr>
<td>Objectives set (expectations, strategy, tasks, dates)</td>
</tr>
<tr>
<td>Training</td>
</tr>
<tr>
<td>Follow up and feedback</td>
</tr>
</tbody>
</table>
Appendix
Appendix A: Job Description Example

<table>
<thead>
<tr>
<th>Position Title:</th>
<th>Job Code:</th>
<th>Overtime Status:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Department: | Location: | Number of People Supervised:

**POSITION PURPOSE**

Essential to the BBBS brand, the primary function of this position is to …

Performance Measures: The successful incumbent will produce positive outcomes in the following areas:

**ESSENTIAL DUTIES AND RESPONSIBILITIES (IN PRIORITY ORDER)**

<table>
<thead>
<tr>
<th>EDUCATION&amp; RELATED WORK EXPERIENCE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Education Level: (minimum &amp; preferred educational requirements necessary to perform this job successfully)</td>
</tr>
<tr>
<td>Years of Related Work Experience: (minimum &amp; preferred related work experience necessary perform this job successfully)</td>
</tr>
</tbody>
</table>

**SKILLS AND KNOWLEDGE**

<table>
<thead>
<tr>
<th>Required</th>
<th>Preferred</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
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</tbody>
</table>

**TRAVEL REQUIREMENTS (LIST AS % OF TOTAL WORK TIME)**

**WORK ENVIRONMENT/PHYSICAL REQUIREMENTS**

(Describe any specific work place conditions and/or physical abilities that are related to and/or required by this job)

<table>
<thead>
<tr>
<th>Core Competencies</th>
<th>High Performance Indicators</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**Equal Employment Opportunity**

BBBS provides equal employment opportunities to all qualified individuals without regard to race, creed, color, religion, national origin, age, sex, marital status, sexual orientation, or non-disqualifying physical or mental handicap or disability.

**Americans with Disabilities Act**

Applicants as well as employees who are or become disabled must be able to perform the essential duties & responsibilities either unaided or with reasonable accommodation. The organization shall determine reasonable accommodation on a case-by-case basis in accordance with applicable law.

**Job Responsibilities**

The above statements reflect the general duties, responsibilities and competencies considered necessary to perform the essential duties & responsibilities of the job and should not be considered as a detailed description of all the work requirements of the position. BBBS may change the specific job duties with or without prior notice based on the needs of the organization.

<table>
<thead>
<tr>
<th>ACKNOWLEDGEMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Creation Date:</strong></td>
</tr>
</tbody>
</table>

**Supervisor:** I have approved this job description and reviewed with my employee.

<table>
<thead>
<tr>
<th>Signature:</th>
<th>Date:</th>
</tr>
</thead>
</table>

**Employee:** I have reviewed this job description with my supervisor and acknowledge receipt.

<table>
<thead>
<tr>
<th>Signature:</th>
<th>Date:</th>
</tr>
</thead>
</table>

**Human Resources:**

<table>
<thead>
<tr>
<th>Signature:</th>
<th>Date:</th>
</tr>
</thead>
</table>
# Appendix B: Hiring Team Task List

<table>
<thead>
<tr>
<th>Task:</th>
<th>Owner (Name):</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Organization Diagnosis</td>
</tr>
<tr>
<td>1. Define job requirements</td>
<td></td>
</tr>
<tr>
<td>2. Write job description</td>
<td></td>
</tr>
<tr>
<td>3. Sign-off on job description</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Prepare for Recruiting</td>
</tr>
<tr>
<td>4. Create marketing recruitment plan</td>
<td></td>
</tr>
<tr>
<td>5. Determine recruiting methods</td>
<td></td>
</tr>
<tr>
<td>6. Determine how candidates will apply</td>
<td></td>
</tr>
<tr>
<td>7. Create job posting for each media chosen</td>
<td></td>
</tr>
<tr>
<td>8. Point person to receive resumes and distribute to review team</td>
<td></td>
</tr>
<tr>
<td>9. Assign scheduler (candidate, interviewer and interview space or location)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sourcing and Recruitment</td>
</tr>
<tr>
<td>10. Review resumes (screening)</td>
<td></td>
</tr>
<tr>
<td>11. Telephone interview</td>
<td></td>
</tr>
<tr>
<td>12. Schedule and stage interviews</td>
<td></td>
</tr>
<tr>
<td>13. Create interview preparation questions</td>
<td></td>
</tr>
<tr>
<td>14. Telephone interviewer</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Selection and Hiring</td>
</tr>
<tr>
<td>15. First in-person interviewer(s)</td>
<td></td>
</tr>
<tr>
<td>16. Second in-person interviewer(s)</td>
<td></td>
</tr>
<tr>
<td>17. Candidate assessment design</td>
<td></td>
</tr>
<tr>
<td>18. Assessment of candidates</td>
<td></td>
</tr>
<tr>
<td>19. Reference and background checks</td>
<td></td>
</tr>
<tr>
<td>20. Verbal offer</td>
<td></td>
</tr>
<tr>
<td>21. Written offer</td>
<td></td>
</tr>
<tr>
<td>22. Negotiations</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Onboarding</td>
</tr>
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<td>23. Onboarding</td>
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Appendix C: Exempt or Non-Exempt FSLA Determination

Exempt or Nonexempt

Employees whose jobs are governed by the FLSA are either "exempt" or "nonexempt." Nonexempt employees are entitled to overtime pay. Exempt employees are not. Most employees covered by the FLSA are nonexempt. Some are not.

Some jobs are classified as exempt by definition. For example, "outside sales" employees are exempt ("inside sales" employees are nonexempt). For most employees, however, whether they are exempt or nonexempt depends on (a) how much they are paid, (b) how they are paid, and (c) what kind of work they do.

With few exceptions, to be exempt an employee must (a) be paid at least $23,600 per year ($455 per week), and (b) be paid on a salary basis, and also (c) perform exempt job duties. These requirements are outlined in the FLSA Regulations (promulgated by the U.S. Department of Labor). Most employees must meet all three "tests" to be exempt.

Salary Level Test

Employees who are paid less than $23,600 per year ($455 per week) are nonexempt. (Employees who earn more than $100,000 per year are almost certainly exempt.)

Salary Basis Test

Generally, an employee is paid on a salary basis if s/he has a "guaranteed minimum" amount of money s/he can count on receiving for any work week in which s/he performs "any" work. This amount need not be the entire compensation received, but there must be some amount of pay the employee can count on receiving in any work week in which s/he performs any work. Some "rules of thumb" indicating that an employee is paid on a salary basis include whether an employee's base pay is computed from an annual figure divided by the number of paydays in a year, or whether an employee's actual pay is lower in work periods when s/he works fewer than the normal number of hours. However, whether an employee is paid on a salary basis is a "fact," and thus specific evaluation of particular circumstances is necessary.
Whether an employee is paid on a salary basis is not affected by whether pay is expressed in hourly terms (as this is a fairly common requirement of many payroll computer programs), but whether the employee in fact has a "guaranteed minimum" amount of pay s/he can count on.

The FLSA salary basis test applies only to reductions in monetary amounts. Requiring an employee to charge absences from work to leave accruals is not a reduction in "pay," because the monetary amount of the employee's paycheck remains the same. Similarly, paying an employee more than the guaranteed salary amount is not normally inconsistent with salary basis status, because this does not result in any reduction in the base pay.

With some exceptions, the base pay of a salary basis employee may not be reduced based on the "quality or quantity" of work performed (provided that the employee does "some" work in the work period). This usually means that the base pay of a salary basis employee may not be reduced if s/he performs less work than normal, if the reason for that is determined by the employer. For example, a salary basis pay employee's base pay may not be reduced if there is "no work" to be performed (such as for a plant closing or slow period), and a salary basis employee's base pay may not be reduced for partial day absences. However, employers may "dock" the base pay of salary basis employees in full day increments, for disciplinary suspensions, or for personal leave, or for sickness under a bona fide sick leave plan (as for example if the employee has run out of accrued sick leave).

Thus, there can be "permissible" and "impermissible" reductions in salary basis pay. Permissible reductions have no effect on the employee's exempt status. Impermissible reductions may, in that the general rule is that an employee who is subjected to impermissible reductions in salary is no longer paid on a salary basis, and is therefore nonexempt. However, employers have several avenues by which they can "cure" impermissible reductions in salary basis pay, and as a practical matter these make it unlikely that an otherwise exempt employee would become nonexempt because of salary basis pay problems. The salary basis pay requirement for exempt status does not apply to some jobs (for example, doctors, lawyers and schoolteachers are exempt even if the employees are paid hourly).
The Duties Tests

An employee who meets the salary level tests and also the salary basis tests is exempt only if s/he also performs exempt job duties. These FLSA exemptions are limited to employees who perform relatively high-level work. Whether the duties of a particular job qualify as exempt depends on what they are. Job titles or position descriptions are of limited usefulness in this determination. (A secretary is still a secretary even if s/he is called an "administrative assistant," and the chief executive officer is still the CEO even if s/he is called a janitor.) It is the actual job tasks that must be evaluated, along with how the particular job tasks "fit" into the employer's overall operations.

There are three typical categories of exempt job duties, called "executive," "professional," and "administrative."

Exempt executive job duties.

Job duties are exempt executive job duties if the employee

1. regularly supervises two or more other employees, and also
2. has management as the primary duty of the position, and also,
3. has some genuine input into the job status of other employees (such as hiring, firing, promotions, or assignments).

Supervision means what it implies. The supervision must be a regular part of the employee's job, and must be of other employees. Supervision of non-employees does not meet the standard. The "two employees" requirement may be met by supervising two full-time employees or the equivalent number of part-time employees. (Two half-time employees equal one full-time employee.)

"Mere supervision" is not sufficient. In addition, the supervisory employee must have "management" as the "primary duty" of the job. The FLSA Regulations contain a list of typical management duties.
These include (in addition to supervision):

- interviewing, selecting, and training employees;
- setting rates of pay and hours of work;
- maintaining production or sales records (beyond the merely clerical);
- appraising productivity; handling employee grievances or complaints, or disciplining employees;
- determining work techniques;
- planning the work;
- apportioning work among employees;
- determining the types of equipment to be used in performing work, or materials needed;
- planning budgets for work;
- monitoring work for legal or regulatory compliance;
- providing for safety and security of the workplace.

Determining whether an employee has management as the primary duty of the position requires case-by-case evaluation. A "rule of thumb" is to determine if the employee is "in charge" of a department or subdivision of the enterprise (such as a shift). One handy clue might be to ask who a telephone inquiry would be directed to if the called asked for "the boss." Typically, only one employee is "in charge" at any particular time. Thus, for example, if a "sergeant" and a "lieutenant" are each at work at the same time (in the same unit or subunit of the organization), only the lieutenant is "in charge" during that time.

An employee may qualify as performing executive job duties even if s/he performs a variety of "regular" job duties as well. For example, the night manager at a fast food restaurant may in reality spend most of the shift preparing food and serving customers. S/he is, however, still "the boss" even when not actually engaged in "active" bossing duties. In the event that some "executive" decisions are required, s/he is there to make them, and this is sufficient.

The final requirement for the executive exemption is that the employee has genuine input into personnel matters. This does not require that the employee be the final decision maker on such matters, but rather that the employee's input is given "particular weight." Usually, it will mean that making personnel recommendations is part of the employee's normal job duties, that the employee makes these kinds of recommendations frequently enough to be a "real" part of the job, and that higher management takes the employee's personnel suggestions or recommendations seriously.
Exempt Professional Job Duties

The job duties of the traditional "learned professions" are exempt. These include lawyers, doctors, dentists, teachers, architects, and clergy. Also included are registered nurses (but not LPNs), accountants (but not bookkeepers), engineers (who have engineering degrees or the equivalent and perform work of the sort usually performed by licensed professional engineers), actuaries, scientists (but not technicians), pharmacists, and other employees who perform work requiring "advanced knowledge" similar to that historically associated with the traditional learned professions.

Professionally exempt work means work which is predominantly intellectual, requires specialized education, and involves the exercise of discretion and judgment. Professionally exempt workers must have education beyond high school, and usually beyond college, in fields that are distinguished from (more "academic" than) the mechanical arts or skilled trades. Advanced degrees are the most common measure of this, but are not absolutely necessary if an employee has attained a similar level of advanced education through other means (and perform essentially the same kind of work as similar employees who do have advanced degrees).

Some employees may also perform "creative professional" job duties which are exempt. This classification applies to jobs such as actors, musicians, composers, writers, cartoonists, and some journalists. It is meant to cover employees in these kinds of jobs whose work requires invention, imagination, originality or talent; who contribute a unique interpretation or analysis.

Identifying most professionally exempt employees is usually pretty straightforward and uncontroversial, but this is not always the case. Whether a journalist is professionally exempt, for example, or a commercial artist, will likely require careful analysis of just what the employee actually does.
Exempt Administrative Job Duties

The most elusive and imprecise of the definitions of exempt job duties is for exempt "administrative" job duties.

The Regulatory definition provides that exempt administrative job duties are

(a) office or non-manual work, which is
(b) directly related to management or general business operations of the employer or the employer's customers, and
(c) a primary component of which involves the exercise of independent judgment and discretion about
(d) matters of significance.

The administrative exemption is designed for relatively high-level employees whose main job is to "keep the business running." A useful rule of thumb is to distinguish administrative employees from "operational" or "production" employees. Employees who make what the business sells are not administrative employees. Administrative employees provide "support" to the operational or production employees. They are "staff" rather than "line" employees. Examples of administrative functions include labor relations and personnel (human resources employees), payroll and finance (including budgeting and benefits management), records maintenance, accounting and tax, marketing and advertising (as differentiated from direct sales), quality control, public relations (including shareholder or investment relations, and government relations), legal and regulatory compliance, and some computer-related jobs (such as network, internet and database administration). (See Computer employees.)

To be exempt under the administrative exemption, the "staff" or "support" work must be office or non-manual, and must be for matters of significance. Clerical employees perform office or non-manual support work but are not administratively exempt. Nor is administrative work exempt just because it is financially important, in the sense that the employer would experience financial losses if the employee fails to perform competently. Administratively exempt work typically involves the exercise of discretion and judgment, with the authority to make independent decisions on matters which affect the business as a whole or a significant part of it.
Interview Guide

Questions to ask might include whether the employee has the authority to formulate or interpret company policies; how major the employee's assignments are in relation to the overall business operations of the enterprise (buying paper clips versus buying a fleet of delivery vehicles, for example); whether the employee has the authority to commit the employer in matters which have significant financial impact; whether the employee has the authority to deviate from company policy without prior approval.

An example of administratively exempt work could be the buyer for a department store. S/he performs office or non-manual work and is not engaged in production or sales. The job involves work which is necessary to the overall operation of the store -- selecting merchandize to be ordered as inventory. It is important work, since having the right inventory (and the right amount of inventory) is crucial to the overall well-being of the store's business. It involves the exercise of a good deal of important judgment and discretion, since it is up to the buyer to select items which will sell in sufficient quantity and at sufficient margins to be profitable. Other examples of administratively exempt employees might be planners and true administrative assistants (as differentiated from secretaries with fancy titles). Bookkeepers, "gal Fridays," and most employees who operate machines are not administratively exempt.

Merely clerical work may be administrative, but it is not exempt. Most secretaries, for example, may accurately be said to be performing administrative work, but their jobs are not usually exempt. Similarly, filing, filling out forms and preparing routine reports, answering telephones, making travel arrangements, working on customer "help desks," and similar jobs are not likely to be high-level enough to be administratively exempt. Many clerical workers do in fact exercise some discretion and judgment in their jobs. However, to "count" the exercise of judgment and discretion must be about matters of considerable importance to the operation of the enterprise as a whole.

Routinely ordering supplies (and even selecting which vendor to buy supplies from) is not likely to be considered high-enough to qualify the employee for administratively exempt status. There is no "bright line." Some secretaries may indeed be high-level, administratively exempt employees (for example, the secretary to the CEO who really does "run his life"), while some employees with fancy titles (e.g., "administrative assistant") may really be performing nonexempt clerical duties.
Rights of Exempt Employees

An exempt employee has virtually "no rights at all" under the FLSA overtime rules. About all an exempt employee is entitled to under the FLSA is to receive the full amount of the base salary in any work period during which s/he performs any work (less any permissible deductions). Nothing in the FLSA prohibits an employer from requiring exempt employees to "punch a clock," or work a particular schedule, or "make up" time lost due to absences. Nor does the FLSA limit the amount of work time an employer may require or expect from any employee, on any schedule. ("Mandatory overtime" is not restricted by the FLSA.)

Keep in mind that this discussion is limited to rights under the FLSA. Exempt employees may have rights under other laws or by way of employment policies or contracts.

Rights of Nonexempt Employees

Nonexempt employees are entitled under the FLSA to time and one-half their "regular rate" of pay for each hour they actually work over the applicable FLSA overtime threshold in the applicable FLSA work period.
Appendix D: Interview Observer Checklist

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<tr>
<th>Did the interviewer remember to:</th>
<th>How they did it:</th>
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<tr>
<td>√ Build Rapport?</td>
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<td>√ Ask JOBS questions?</td>
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<tr>
<td>√ Ask past event questions?</td>
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<td>√ Ask open-ended questions?</td>
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<td>√ Gain specific behavioral examples?</td>
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<td>√ Probe using SHARE?</td>
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<td>√ Allow silence?</td>
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<tr>
<td>√ Look for contrary evidence?</td>
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<tr>
<td>√ Take notes?</td>
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<td>√ “Interrupt” to keep candidate on track?</td>
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Appendix E: Impermissible Questions

Interviewing candidates effectively requires both skill and finesse. This section will give a basic overview of legal issues that you may encounter in the interview process.

- Legal issues
- Questions to avoid

Legal issues

When interviewing, keep legal regulations in mind, especially as it relates to non-discrimination laws (prohibiting discrimination based on on age, race, color, religion, sex, or national origin) and the Americans with Disabilities Act (prohibiting employment discrimination against qualified individuals with disabilities).

Typical traps that hiring managers tend to fall into come during the "small talk" of the interviewer. There are very few 'safe' questions. Depending on the location and the interpretation of the candidate, most questions can be looked at as discriminatory and place BBBS in a compromising position. For example, there was a time in the UK (if not currently present) that it was unlawful to ask a candidate about their favorite sports team because the teams were tied to a specific political affiliation.

Questions to avoid

In keeping with the EEOC regulations, it is important to make note of questions which could be interpreted as discriminatory. Here are some examples of impermissible questions:

- Impermissible Questions Regarding Eligibility to Work in the United States:
  - Are you a U.S. citizen (except in cases, such as high-security government jobs, where citizenship is required)?
  - Are you a naturalized citizen?
  - Are your parents' citizens of the United States?
  - When did you become a U.S. citizen?
  - When did your parents become U.S. citizens?

**Note:** Under the Immigration Reform and Control Act, an employer can and must ask an applicant whether he or she lawfully is eligible to work in the United States. However, it is not necessary that the applicant be a United States citizen. There are other ways for an applicant to establish eligibility for employment. **However, the issue of eligibility for employment should not be addressed in the interview process.** If an applicant is hired, he or she will be required, post-hire, to provide the legally-required information to establish his or her identity and eligibility for employment.
• **Impermissible Questions Regarding National Origin**
  
  o Where were you born?
  o Where were your parents born?
  o Have you traveled to any foreign country? Why did you choose that country?
  o Have you lived in another country for any significant period of time? When? Why?
  o Are you a member of any cultural, cultural assimilation or social cause group?
  o What is your original name, if it has been changed?
  o That's an interesting name. What's the origin?
  o Do you read, speak or write a foreign language?
  o How did you acquire your ability to read, speak or write a foreign language?

  **Note:** As a narrow exception to the general rule that an interviewer cannot ask an applicant whether he or she speaks, reads or writes a language other than English, this question may be asked of an applicant if he or she is applying for a job with respect to which it is preferred and/or required as an essential component of the job. Although the applicant cannot be questioned as to how he or she acquired his or her ability to read, speak or write a foreign language other than English, the extent of his or her proficiency with the language is a legitimate subject of discussion to the extent it is job-related.

• **Impermissible Questions Regarding Sex/Marital Status/Parental Status**
  
  o Are you married?
  o Are you divorced?
  o Why do you hyphenate your name?
  o What was your maiden name?
  o Are you engaged to be married?
  o Do you have a significant other?
  o Are you dating anyone?
  o What does your spouse do for a living?
  o What do your parents do for a living?
  o Would you move if your spouse's employer required a move?
  o Do you have any children?
  o Do you intend to have children?
  o How will you accommodate your family responsibilities and professional or job duties?
  o Do you usually wear jewelry/make up?
  o Who will watch your children while you are at work?

  **Note:** Although an interviewer cannot ask an applicant whether he or she has children and/or whether he or she has someone who could watch his or her children while he or she is at work, an interviewer can ask applicants whether they can report to work daily, whether they can work overtime, whether they can travel and whether there are any shifts which they cannot work. However, these questions cannot be asked only of applicants who indicate they have children or appear to be of child-bearing age. Nor can these questions be asked only or principally of women. If these questions are asked, they can and should be asked of all applicants who apply for a given position, and only those questions which relate directly to the job's responsibilities.
• **Impermissible Questions Regarding Sexual Preference/Orientation/Affection**
  o Are you engaged to be married?
  o Do you have a significant other?
  o Do you have a roommate?
  o Are you a member of any political or social cause group?
  o What is your sexual preference or orientation or affection?
  o How has the AIDS epidemic affected you?

• **Impermissible Questions Regarding Religion**
  o What is your religious affiliation?
  o Which or how many religious holidays do you observe?
  o Do you attend a house of worship regularly?
  o Are you a member of any religious group?
  o Do you do any communication work in connection with a church?

**Note:** As previously indicated, one of the questions which can be asked of all applicants is whether there are any shifts which they cannot work. If an applicant indicates that he or she cannot work a particular shift due to his or her religious beliefs and/or observances, then the organization may have a duty to accommodate such religious beliefs and/or observances. Consult with Human Resources. Please do not, however, specifically ask an applicant whether the limitations which he or she indicates in terms of scheduling are due to religious reasons if he or she does not so indicate; the burden is on the applicant to provide you with the reason if he or she seeks and/or needs an accommodation.

• **Impermissible Questions Regarding Physical or Mental Handicap or Disability**
  o Do you have any physical handicaps or disabilities?
  o Do you have any mental or emotional handicaps or disabilities?
  o Are you related to, or do you associate with, anyone who has a physical, mental or emotional handicap or disability?
  o Have you ever been hospitalized? If so, for what condition?
  o Please list any conditions or diseases for which you have been treated in the last __ years.
  o Have you ever been treated by a psychiatrist or psychologist? If so, for what condition?
  o Have you ever been treated for any medical condition?
  o Is there any health-related reason why you cannot perform the job for which you are applying?
  o Have you had any major illness in the last __ years?
  o How many days were you absent from work last year because of illness?
  o Have you ever filed for workers’ compensation insurance?
  o Are you taking any prescribed drugs?
  o Have you ever been treated for drug addiction or alcoholism?
**Note:** Although interviewers cannot ask applicants whether they have any physical or mental disability, interviewers can ask applicants whether they are able to perform the essential function of the job for which they have applied, provided that this question is asked of each applicant who applies for the position. In such circumstances, a copy of the job description should be given to the applicant to review.

Also, an interviewer cannot, under any circumstances, ask an applicant whether he or she has any physical or mental disability. If the applicant has a physical or mental disability which is visible, or the applicant voluntarily discloses the existence of a physical or mental disability which is not visible, the interviewer can ask the applicant whether he or she can perform the essential functions of the job for which he or she has applied, if it appears that the physical or mental condition could interfere with such function. However, the interviewer cannot ask any questions about the nature, cause or prognosis for the physical or mental condition. In all circumstances where an applicant's physical or mental condition is discussed in the interview, HR must be consulted immediately.

- **Impermissible Questions Regarding Military Status**
  - Have you ever served in the armed services?
  - Have you ever lived for any significant period of time in a location away from your parents which was not connected to your schooling?
  - How did you finance your education?

**Note:** Although an interviewer should not ask an individual whether he or she has served in the Armed Services, if the individual lists such Service on his or her Application or resume, the interviewer can ask the nature of his or her employment responsibilities with the Armed Services.

- **Impermissible Questions Regarding Age**
  - How old are you?
  - What year were you born?
  - What year did you graduate high school?
  - What year did you graduate college?
  - How would someone your age fit in with younger people?

**Note:** There is no lawful mandatory retirement age. Therefore, you cannot ask someone his or her age, no matter how old he or she may look.

Nor can you ask someone who appears to be older questions about his or her ability to perform particularly-stressful functions of a job, unless such questions are asked of all applicants for a position, regardless of what age they may appear to be.

If someone looks very young, you may ask him or her if he or she is age 18 or over. If he or she is not age 18 or over, then you must obtain an Employment Certificate from him or her before you allow him or her to work.
• **Impermissible Questions Regarding Race**
  - What is your race?
  - Where were you born?
  - What do your parents do?
  - Are you a member of any civil rights or social cause group?

• **Impermissible Questions Regarding Arrest Record**
  - Have you ever been arrested?
  - Have you ever been convicted of any crime?

  **Note:** Although the organization cannot ask applicants about arrests, the organization can ask applicants about criminal convictions. However, this question should be included on the Application for Employment as opposed to being asked in the interview process.

• **Impermissible Questions Regarding Union Membership**
  - Have you ever been a member of a union?
  - What are your feelings on unions?
  - Do you believe labor unions have too much power?

• **Impermissible Questions Regarding Driving**
  - Do you own a car?
  - Do you have a driver's license?

  **Note:** Generally, you cannot ask someone whether he or she owns a car. However, you can ask an applicant whether he or she has a dependable way to get to work each day, provided that this question is asked of each and every applicant for the position. Also, if the person's job requires driving during the work day, you can ask him or her if he or she has a valid driver's license.