Inclusive Hiring During a Pandemic

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- Reference Check Questions (from the LinkedIn Talent Blog)

Contact Shaun Samuels, shaun@opportunityjuncture.org, with questions.
## Training and Assessment Resources for Hiring and Remote Work

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<tr>
<th>Category</th>
<th>Source</th>
<th>Free</th>
<th>Fee</th>
<th>Advisory</th>
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<tr>
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<td>Microsoft</td>
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<td>DEIB for All</td>
<td>LinkedIn Learning</td>
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<td>Certification Path</td>
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<td>DEIB for HR &amp; Leaders</td>
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<tr>
<td>Become an Inclusive Leader</td>
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<td>Unconscious Bias and the Hiring Process by Dr. Tyrone Holmes</td>
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<td>Certification Path</td>
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<tr>
<td>Online Assessments</td>
<td>Skills Assessment</td>
<td>X</td>
<td></td>
<td>Basic windows and office software assessments available; grouping test may have additional fees</td>
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<tr>
<td>Online Assessments</td>
<td>HR Avatar</td>
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<td></td>
<td>Cost: $45/assessment; huge array of assessments by position with advisories</td>
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<tr>
<td>Online recruitment and assessments</td>
<td>Easy Hire</td>
<td>X</td>
<td>X</td>
<td>Free access for up to 5 interviews</td>
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</table>
Competency-Based Hiring: Executive Assistant

1. **The Job Posting.** Note that it specifies candidates needed competencies, not qualifications. Distribute this broadly to recruit a diverse field of candidates. Insist that candidates follow the instructions for applying.

2. **The Telephone Screen.** Ask the same questions of each candidate you screen. You can adjust how much of their experience you want to probe in this first interaction. Candidates’ answers to the question about what would be the most difficult aspect of the job can be very telling.

3. **Evaluating Candidates’ Competencies.** Determine ahead of time how you will evaluate competencies. Use behavioral interviewing and assessments that resemble real-world assignments.

4. **Hiring Rubric.** Before staff members interview the candidate, they should review a rubric to know what they’re looking for. This will help them provide the feedback that guides you to the candidate who mostly closely matches your profile.

5. **Writing Assessments.** This sample includes both writing assessments and instructions for the numeracy assessment. There may also be standardized assessments (as for the Microsoft Office Suite) that you use.

6. **Numeracy Assessment.** This document contains the information for candidates to use in completing the numeracy assessment described in the previous document.

7. **Reference Check Questions.** From the LinkedIn Talent Blog.
Executive Assistant

Opportunity Junction is seeking a skilled administrative professional to support the leadership team as an Executive Assistant. Reporting to the CEO, and with the responsibility of supporting the vice presidents of programs and administration, the Executive Assistant will also provide support to the development director. Strong communication and computer skills will be important in this new position.

Because this role is a new one, the responsibilities will evolve as the Executive Assistant joins the team. Among the responsibilities will be:

- Supporting board and committee meetings by scheduling, preparing pre-read materials, and taking minutes
- Assembling and creating documentation of processes and procedures
- Coordinating facilities issues and interacting with vendors
- Performing QuickBooks, Salesforce, and Greater Giving data entry
- Completing and leading administrative projects like our annual time study
- Helping with coordination for the annual gala and other events

At Opportunity Junction, we believe that everyone who is willing to work hard deserves an opportunity to succeed. We help low-income residents of East Contra Costa, most of them living below the poverty line, gain the skills and confidence they need to get and keep jobs that support themselves and their families. The work is intensely rewarding.

Our culture is nimble, implementing current best practices and embracing new opportunities while learning from mistakes, and you should be, too. If we can find a better way to serve our job seekers or the employers who hire them, we want to make it happen.

Education/Certification/Experience level needed:

- Any combination of training and/or experience that has developed the competencies described below; and
- Net typing speed of 60 wpm minimum.

Necessary Competencies (should have these or demonstrate the ability to develop them):

- **Communication**: Ability to write grammatically correct prose in a variety of formats (email, meeting minutes, etc.) and to communicate professionally on the phone and in person with a wide range of stakeholders.
- **Technology**: Strong proficiency in Microsoft Word and Excel; competency in PowerPoint, Adobe Acrobat, and a mail/calendar client (Google Apps or Outlook); and able to efficiently use our online database systems (Salesforce, QuickBooks, Greater Giving) and other web-based applications (e.g. SurveyMonkey, Vertical Response, EventBrite).
- **Numeracy**: Able to understand and work with budgets and basic calculations.
- **Problem-Solving**: Resourceful, with the ability to juggle priorities from multiple managers, approach challenges creatively, and team with other staff to develop solutions.

- **Project management**: Organized, detail-oriented, and able to plan and execute on projects that may need to be completed monthly or quarterly.

Salary range is $45,000 to $50,000, and benefits include 16 paid holidays, including the week between Christmas and New Year, along with a starting Paid Time Off (PTO) accrual of 21 days per year.

Alumni of our programs are encouraged to apply.

Applications should be made through Indeed, where you will be asked to complete preliminary assessments. Please attach both a resume and a cover letter that describes your interest in the position and that serves as an initial demonstration of your qualifications for the position.
Telephone Screen Questions: Executive Assistant

1. Where are you in your job search?

2. When could you start working?

3. What reasons do you have for leaving your most recent job?

4. What attracted you to apply for the Executive Assistant position?

5. What interests you about the work of Opportunity Junction?

6. How much would you expect to earn in this position?

7. Tell me about your experience with the responsibilities of this position.
   a. Supporting board and committee meetings by scheduling, preparing pre-read materials, and taking minutes
   b. Assembling and creating documentation of processes and procedures
   c. Coordinating facilities issues and interacting with vendors
   d. Performing QuickBooks, Salesforce, and Greater Giving data entry
   e. Completing and leading administrative projects like our annual time study
   f. Helping with coordination for the annual gala and other events

8. What do you expect would be the most difficult part of this position?
Evaluating Candidates’ Competencies

Use a combination of behavioral interview questions and assessments to evaluate each candidate’s fit.

<table>
<thead>
<tr>
<th>Competency</th>
<th>Elements</th>
<th>Evaluation</th>
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</table>
| **Communication:** Ability to write grammatically correct prose in a variety of formats (email, meeting minutes, etc.) and to communicate professionally on the phone and in person with a wide range of stakeholders. | • Write grammatically correct prose  
• In a variety of formats (email, meeting minutes, etc.)  
• Communicate professionally on the phone and in person  
• With wide range of stakeholders | • Check resume, cover letter, and emails  
• Assessment of one or two likely assignments that cannot be proofread by others  
• Evaluate based on telephone screen and in-person or Zoom interviews  
• Make sure to include a panel interview |
| **Technology:** Strong proficiency in Microsoft Word and Excel; competency in PowerPoint, Adobe Acrobat, and a mail/calendar client (Google Apps or Outlook); and able to efficiently use our online database systems (Salesforce, QuickBooks, Greater Giving) and other web-based applications (e.g. SurveyMonkey, Vertical Response, EventBrite). | • Strong proficiency in Microsoft Word and Excel  
• Competency in PowerPoint, Adobe Acrobat, and a mail/calendar client (Google Apps or Outlook)  
• Able to efficiently use our online database systems (Salesforce, QuickBooks, Greater Giving) and other web-based applications | • Assessments are ideal (we use Microsoft practice tests)  
• If these can be taught, consider asking experience level. “How have you used _______ in the past?” and “What was your biggest frustration with ______?”  
• For applications you expect to teach, consider a very simple assessment that requires figuring out an unfamiliar web application or asking about similar applications: “What online databases have you worked with?” and “How did you learn how to use it?” |
| **Numeracy:** Able to understand and work with budgets and basic calculations. | • Able to understand and work with budgets and basic calculations. | • Assessments are ideal, because it’s hard to probe with questions. |
| **Problem-Solving:** Resourceful, with the ability to juggle priorities | • Problem-solving | “Tell me about a time you encountered an obstacle to achieving one of your goals.” }
from multiple managers, approach challenges creatively, and team with other staff to develop solutions.

- Resourceful, with the ability to juggle priorities from multiple managers
- Approach challenges creatively
- Team with other staff to develop solutions.

needed, follow up with “How did you approach it and overcome the obstacle?”
- “Describe a time when you had competing priorities that you had to resolve. How did you handle it?”
- It’s hard to ask a behavioral interview question about this. Hopefully, the answers to the previous questions give you a sense of the candidate’s creativity and flexibility.
- “Give me an example when you could not come up with a solution to a challenge on your own and engaged coworkers to help develop solutions.”

| **Project management:**  
| Organized, detail-oriented, and able to plan and execute on projects that may need to be completed monthly or quarterly. | Organized
- Detail-oriented
- Able to plan and execute on projects that may need to be completed monthly or quarterly |
| This may be evident from the way the candidate approaches their job search
- Evaluate based on assessments for other skills
- “Tell me about a project or process that you had to plan out and execute.” If needed, follow up with “Were you starting from scratch or building on an existing process?” and “How did you approach the planning?” and other follow-up. |
# Candidate Evaluation Form

**Candidate:**  
**Interviewer:**  
**Date:**

**Please rate candidate on scale of 1-4 based on whether they hit our bar in each specific must-have:**

4 = Solidly meets the bar  
3 = Yes, with some concerns  
2 = Evidence points to no  
1 = Big Red Flag in this area

*NOTE: The numbers are a rough guide – we care more about your impressions, questions, and thoughts on overall fit, particular strengths and/or flags than we do about the numbers themselves; they’re just a helpful shorthand. Ultimately, hiring managers will make final decisions weighing various needs and trade-offs.*

## One-sentence profile:
Detail-oriented and organized self-starter with excellent administrative skills.

<table>
<thead>
<tr>
<th>Must-have (These describe a 4. This is not the highest ideal; it’s a description of the fundamentals on the theory that we can teach people beyond this)</th>
<th>1-4</th>
<th>Comments/Examples/Evidence</th>
</tr>
</thead>
</table>
| **Communication**  
- Can write grammatically correct prose in a variety of formats  
- Able to communicate professionally on the phone and in person with a variety of stakeholders | | Please note 1-2 examples of what you observed; If you have questions or concerns, include those here |
| **Technology**  
- Proficient in Microsoft Word and Excel  
- Has experience using calendar applications for scheduling meetings with multiple stakeholders  
- Has prepared PowerPoint presentations that effectively use graphics  
- Has experience using Salesforce, QuickBooks, or another online database system | | |
| **Numeracy**  
- Can answer basic math questions about a budget and interpret a graph (assess) | | |
| **Project Management**  
- Able to organize and manage events with many moving parts  
- Identifies and mitigates the risks to successful project completion | | |
| **Problem-Solving**  
- Demonstrates persistence in the face of obstacles to the accomplishment of goals  
- Can creatively develop workarounds when facing obstacles | | |
| **Other comments** | | |

## Overall recommendation:

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Executive Assistant Assessments

**Assessment 1:** Writing an Email (~10 minutes)

Alissa needs to schedule a meeting of the Executive Committee to plan implementation for one of the year’s Annual Plan goals: “Set goal for board member participation in planned giving and total board giving.” The board has not previous done this. Alissa is available for this on November 5th at 8:30 am or 1:00 pm, on November 6th at 8:30 am or 9:30 am, or on November 7th at 4 pm.

Write an email to the committee members to kick off the scheduling process. Save with the filename Email.docx in the folder with your name.

**Assessment 2:** Documentation of a Process (~20 minutes)

Write a checklist documenting how to do one of the following for use by an intern you are supervising:

- Create a single PDF file out of several Word files (using Acrobat or not)
- Perform a Mail Merge in Word using an Excel spreadsheet as the data source
- Process an incoming invoice for later payment (using QuickBooks)
- Secure a parking reservation using ParkWhiz (OK to use their website)

Save this with the filename Checklist.docx

**Assessment 3:** Working with Charts and Numbers (~15 minutes)

Reference the Extreme Commutes chart document. You may use a calculator or Excel. Open and save a new Word document with the filename Charts.docx and answer the following questions:

1. An Extreme Commute is one that is 90 minutes or more in each direction. If there were 300,000 Contra Costa residents commuting to work in 2005, what is the minimum number of hours that the Extreme Commuters spent commuting each work day collectively?
2. By what percentage are Extreme Commutes higher for those earning more than 350% of the FPG than for those earning less than 200% of the FPG?
3. How are these two charts (and their data) inconsistent with each other? Explain.
4. Extra credit: What might have happened in creating these diagrams to explain the discrepancy?
**Extreme Commutes in Contra Costa**

<table>
<thead>
<tr>
<th>Year</th>
<th>Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>2005</td>
<td>15.9%</td>
</tr>
<tr>
<td>2010</td>
<td>13.0%</td>
</tr>
<tr>
<td>2015</td>
<td>14.6%</td>
</tr>
</tbody>
</table>

2015 Extreme Commutes in Contra Costa

- Earning less than 200% of FPG: 16.2%
- Earning 200% to 350% of FPG: 14.8%
- Earning more than 350% of FPG: 17.1%

FPG = Federal Poverty Guideline
Reference Check Questions and Explanations
From the LinkedIn Talent Blog


1. Tell me about how you and Pat worked together.

To start things off, give Pat’s former manager a chance to get comfortable and to start verifying what Pat has already told you. Find out when they worked together and for how long, and check on Pat’s title and responsibilities. Make sure you find out how closely and regularly Pat and the reference worked together.

2. Did Pat have any major accomplishments while working for you?

To some extent, this is a softball question to further relax the reference and to validate, again, claims Pat made in interviews. It's also a reminder that reference checks are not simply a ‘gotcha’ exercise to catch candidates in a fib or exaggeration. They are a chance to better understand the qualities and skills Pat brings, particularly if she’s a humble or introverted person who may have struggled selling herself during your interviews.

3. For this position, we need someone who can __________ [fill in the most important things]. How would you rate Pat on each?

This question is essential. “This is an opportunity for you to get a third party’s perspective on the candidate’s potential skill match for the position you are hiring,” says Sean Falconer, Founder and CTO of Proven.

To understand which of these things would be Pat’s strength–and which would be her weakness–have your reference rate Pat on each of the competencies you list. Ask them to use a 1-to-10 scale and only allow them to give you a 10 on one of them in order to get a more realistic picture.

4. What are Pat’s greatest strengths?

The answer to this question will allow you to calibrate your impressions—based on Pat’s resume, interviews, and work samples—with those of someone who has worked alongside Pat. You’ll also have a chance to see how the response lines up with Pat’s self-assessment, which may offer a clue to Pat’s self-awareness and allow you to calibrate her other answers.
5. What are Pat’s biggest weaknesses? Is there any area where she would need additional support in her first 90 days?

This question serves a dual purpose. As Pat’s prospective manager, you need to know how to make Pat successful in her new role. The question may also help you determine whether Pat is coachable. If the reference gives you an answer that is a little cliché—say, “she works too hard” or “she cares too much”—find out what’s underneath it. Does Pat come to work exhausted? Does she seem low on energy? If you get a thoughtful answer here and then offer Pat a job, you will have a big head start with insights that might have taken you months or even years to acquire otherwise.

The other purpose of this question is to surface any reasons why you may want to rethink Pat as part of your team. For example, if Pat’s former boss says Pat would really benefit from some anger management classes, you might want to consider ending your interview early and moving on to Candidate B.

6. Was Pat a good communicator and listener?

It’ll be helpful to get a sense of some of Pat’s soft skills. If your reference says Pat was a good communicator, ask for an example of when that showed up. Same for listening skills. And each time you ask for a specific instance you are also checking on how well your reference really knows Pat. Of course, you can swap out these two soft skills for others you feel are more important to get info on.

7. Did Pat receive any promotions while at your company?

If Pat was promoted, that generally bolsters her candidacy. If not, make sure you push to understand why—no open positions, stronger internal candidates (a possible red flag), missing skill set, etc.

8. On a scale of 1 to 10, compared to other people you’ve hired, how would you rate Pat?

“You want to hear 8, 9, or 10,” writes author Jeff Hyman in Recruit Rockstars. “Anything less than an 8 is a red flag, because they’re likely being generous.” If Pat’s an 8 or 9, what would it have taken for Pat to be a 10?

9. Why did Pat leave your company?

Like your opening question, this one allows you to validate what Pat has already told you.

10. Would you rehire Pat?

Listen carefully. “I’m looking for ‘definitely’ or ‘absolutely’ without hesitation,” Hyman says.

11. Is there anyone else you’d recommend I speak to?