How to Hire and Retain Quality Employees

Workshop Handouts

1. Recruitment Strategy Planning Template
2. Job Description Template
3. Job Advertisement Template
4. Orientation and Onboarding Checklist

Schedule a Complimentary Discovery Call: www.skyehrconsulting.com
RECRUITMENT STRATEGY PLANNING EXAMPLE – PAGE 1

GOAL
To recruit and hire a qualified Development Director out of a diverse pool of candidates by September.  
*Goal: No more than 45 days from job posting to job offer.

STRATEGY

We will ensure our hiring process reflects our values by....
- Flexibility: Interview candidates after hours if needed
- Respect: Communicate timely and consistently with candidates. Always follow-up.
- Equity: Ensure the hiring committee receives anti-bias training, remove barriers to hiring outlined below, ask the same questions of every candidate, use a rubric

We will remove barriers to hiring by....
- Applicants submit their resume and cover letter (employment application is later in the process)
- Remove education requirements from the job description
- Ensure candidates receive timely and consistent communication
- Ensure transparency by giving adequate info about the hiring process and the job to candidates

We will seek to attract a pool of qualified candidates from a variety of backgrounds by...

ADVERTISING
- Internally to existing employees
- Social media
- Idealist.org
- Washington Nonprofit Association
- Website
- Newsletter
- Indeed.com
- Power to Fly.com
- HireLatinos.org
- NAACP local chapter
- Pink-Jobs.com
- Handshake.com
- DiversityJobs.com
- Cherry Creek Media
- Elkhorn Media Group
- Walla Walla Union Bulletin
- Waitsburg Times
- Dayton Chronicle
- Valley Herald (Milton Freewater, Umatilla County)
- KUJ AM radio
- La Voz
- Tu Decides Media
- Latino 96.7

SOURCING
- LinkedIn Outreach
- Hiring committee sourcing list
- Hiring committee shares with networks

EQUITY AND INCLUSION CHECKLIST
- Anti-bias training for hiring committee
- Salary transparency
- Realistic job description
- Use a rubric for evaluating candidates
- Provide questions ahead of time
- Provide candidates with the same information
- Ask the same interview questions
### PROCESS OVERVIEW

<table>
<thead>
<tr>
<th>Action Item</th>
<th>TARGET Timeline</th>
<th>Person(s) Responsible</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 – Finalize job description and advertisement</td>
<td>By 7/14</td>
<td>Recruiter sends job description and job ad to Hiring Committee by 7/09</td>
</tr>
<tr>
<td>2 – Post job advertisement/source candidates</td>
<td>7/15-8/05</td>
<td>Recruiter</td>
</tr>
<tr>
<td>3 – Phone-screen top applicants (10-15 candidates)</td>
<td>7/15-8/05</td>
<td>Recruiter</td>
</tr>
<tr>
<td>4 – Interview top candidates (3-5 candidates)</td>
<td>By 8/13</td>
<td>Hiring Committee</td>
</tr>
<tr>
<td>5 – Interview final candidates (1-2 candidates)</td>
<td>By 8/20</td>
<td>Board + Hiring Committee + Member of Management Team</td>
</tr>
<tr>
<td>6 – Make conditional job offer</td>
<td>By 8/27</td>
<td>Board President/Recruiter</td>
</tr>
<tr>
<td>7 – Coordinate background check, if applicable, conduct reference checks</td>
<td>By 9/01 (it generally takes a few days to check references and conduct background check)</td>
<td>Recruiter</td>
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<tr>
<td>8 – Start date/orientation</td>
<td>By mid-September (depends on candidate’s current employment situation)</td>
<td>Board President/Recruiter</td>
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<tr>
<td>9 – Onboarding</td>
<td>Sept-Dec</td>
<td>Board President</td>
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### FREEBIE: Phone Screen Checklist

[Click Here](#) for how to conduct effective phone screening + Free phone screen checklist
Job Title: Development Director
Supervisor: Executive Director
Pay Range: $65,000-$85,000
Classification: Exempt/Salaried
Location: XYZ Address
Date: March 2022

JOB SUMMARY: The Development Director leads our organization’s fundraising and development strategy in order to sustain and grow our organization’s mission and program goals.

ESSENTIAL DUTIES AND RESPONSIBILITIES (NOT AN EXHAUSTIVE LIST)

• Leadership: Creates a positive team environment by modeling and promoting the organization’s values. Hires, trains, supervises, develops, encourages, empowers, and coaches development staff. Consistently seeks and applies feedback from employees, co-workers, supervisor, clients, and donors.

• Fund Development: Develops and executes the annual strategic fundraising plan, including private grants and donations, corporate gifts, planned giving, government funding, and in-kind donations.

• Fundraising: Manages all aspects of fundraising, including capital and specific development campaigns to consistently increase funding for programs.

• Donor Engagement: Identifies, develops relationships with, and engages donors through strategic and meaningful engagement, communications, events, and through making direct asks.

• Grants Management: Develops sustainable grant funding through identifying and applying for new grant opportunities, sustaining and complying with existing grant requirements, and maintaining excellent relationships with funders.

• Community Engagement: Identifies and attends community events, gives public presentations, and coordinates and hosts events to raise awareness of the organization’s mission. Consistently promotes programs and events via the website, social media, and by attending networking events.

QUALIFICATIONS

• Experience with fundraising, donor stewardship, grant writing, and grants management.
• Proven track record of success with achieving funded grant proposals.
• Previous supervisory experience.
• Ability to prioritize multiple tasks and perform effectively under the pressure of multiple deadlines.
• Demonstrated experience working with and communicating effectively with people from a variety of backgrounds from lived experience to professional experience.
• Ability to thrive in a setting where teamwork, collaboration, and accountability is required.
• Ability to develop trusted working relationships with internal and external stakeholders.
• A commitment to justice, equity, diversity, and inclusion and the ability to integrate your commitment into your work.
• A willingness to travel locally up to 15% of the time for donor meetings, conferences, events, etc.
• Due to our work with vulnerable populations, a background check is required for the position. Criminal history will be reviewed on a case-by-case basis and does not necessarily preclude employment.
• Experience developing budgets and financial reports and utilizing a donor database and spreadsheets.
• Proficient in Microsoft Office Suite and G Suite.
WORKING CONDITIONS:

Our organization is welcoming to all physical and mental abilities. The working conditions, physical demands and essential functions described here are representative of those that must be met, with or without reasonable accommodation. *To request a reasonable accommodation, employees are encouraged to contact their supervisor and HR at any time.*

- This is a full-time, exempt/salaried position. Days and hours of work are generally Monday through Friday, 8:00 a.m. to 5:00 p.m. with some nights and weekends approximately up to 10% of the time.
- Local travel is required for approximately up to 15% of the time.
- Work includes prolonged periods of computer work. Work is performed in both an office environment and at conferences, events, and outside meetings.

COMMITMENT TO JUSTICE, EQUITY, DIVERSITY, AND INCLUSION

Our organization is an equal opportunity employer, and we are committed to justice, equity, diversity, and inclusion in every aspect of our organization. If you have questions, feedback, or concerns, please reach out to your supervisor or HR.

SIGNATURES

Your questions, feedback, and input on the job description are welcomed. You may contact your supervisor or HR to discuss your job description at any time. This job description does not change the nature of the “at-will” employment relationship. The job description is subject to change, as needed.

EMPLOYEE SIGNATURE: ______________________________________ DATE: ___________________

SUPERVISOR SIGNATURE: ______________________________________ DATE: ___________________
DEVELOPMENT DIRECTOR

ABOUT THE POSITION

Do you want to help end homelessness in Walla Walla?

XYZ Organization is currently hiring a Development Director to lead our organization’s fundraising and development strategy. This is an exciting opportunity to sustain and grow our organization’s mission and program goals to end homelessness in Walla Walla.

What does this job entail?

- **Leadership:** Creates a positive team environment by modeling and promoting the organization’s values. Hires, trains, supervises, develops, encourages, empowers, and coaches development staff. Consistently seeks and applies feedback from employees, co-workers, supervisor, clients, and donors.
- **Fund Development:** Develops and executes the annual strategic fundraising plan, including private grants and donations, corporate gifts, planned giving, government funding, and in-kind donations.
- **Fundraising:** Manages all aspects of fundraising, including capital and specific development campaigns to consistently increase funding for programs.
- **Donor Engagement:** Identifies, develops relationships with, and engages donors through strategic and meaningful engagement, communications, events, and through making direct asks.
- **Grants Management:** Develops sustainable grant funding through identifying and applying for new grant opportunities, sustaining and complying with existing grant requirements, and maintaining excellent relationships with funders.
- **Community Engagement:** Identifies and attends community events, gives public presentations, and coordinates and hosts events to raise awareness of the organization’s mission. Consistently promotes programs and events via the website, social media, and by attending networking events.

COMPENSATION, BENEFITS, AND DETAILS

- Flexible scheduling and work-from-home two days a week.
- A welcoming, inclusive office environment right downtown off the bus line.
- Excellent, affordable health insurance ($100 per month for employee coverage. Domestic partner and dependent coverage available.)
- 10 paid holidays, 2 weeks’ vacation, and 2 weeks’ sick leave.
- Employer-paid life insurance and long-term disability insurance.

LOCATION: XYZ address plus work-from-home up to 2 days a week

COMPENSATION: $65,000-$85,000, commensurate with experience and qualifications

HOW DO I APPLY?

Submit your resume and cover letter to xyz@xyzorganization.com by 5:00 p.m. on September 1, 2022.
QUALIFICATIONS

- Experience with fundraising, donor stewardship, grant writing, and grants management.
- Proven track record of success with achieving funded grant proposals.
- Previous supervisory experience.
- Ability to prioritize multiple tasks and perform effectively under the pressure of multiple deadlines.
- Demonstrated experience working with and communicating effectively with people from a variety of backgrounds from lived experience to professional experience.
- The ability to thrive in a setting where teamwork, collaboration, and accountability is required.
- The ability to develop trusted working relationships with internal and external stakeholders.
- A commitment to justice, equity, diversity, and inclusion and the ability to integrate your commitment into your work.
- A willingness to travel locally up to 15% of the time for donor meetings, conferences, events, etc.
- Due to our work with vulnerable populations, a background check is required for the position. Criminal history will be reviewed on a case-by-case basis and does not necessarily preclude employment.
- Experience interpreting program budgets and financial reports and utilizing a donor database and spreadsheets.
- Proficient in Microsoft Office Suite and G Suite.

WHO WE ARE

At XYZ Organization, our mission is to feed the homeless and our vision is to end homelessness in Walla Walla. Founded in 1950, our 100-employee organization serves 2,000 meals to the homeless each month.

Our values include:

- Diversity, Equity, and Inclusion
- Employee Wellbeing
- Creating a Respectful and Collaborative Workplace

Our organization is an equal opportunity employer, and we are committed to justice, equity, diversity, and inclusion in every aspect of our organization, including hiring.

If you are in need of an accommodation during the hiring process, please reach out to us at xyz@xyzorganization.com.

Learn more about us at www.xyzorganization.com
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<tr>
<th>WHEN</th>
<th>WHO</th>
<th>WHAT</th>
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<td>BEFORE EMPLOYEE STARTS</td>
<td></td>
<td>□ Confirm start date and obtain signed offer letter</td>
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<td>□ Talk with the employee about what to expect on day 1, week 1, month 1</td>
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<td>□ Notify all Staff via email of employee’s first day</td>
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<td>□ Notify Admin/Finance/IT of employee’s start date</td>
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<td>□ Set up employee file</td>
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<td>□ Set up technology and equipment, if applicable</td>
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<td>□ Prepare orientation packet</td>
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<td>□ Prepare/update orientation presentation</td>
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<td>□ Obtain keys for employee’s orientation, if applicable</td>
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<td>□ Order business cards and nametags, if applicable</td>
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<td>□ Send welcome email to employee</td>
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<td>□ Coordinate welcome gift for first day</td>
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<td>□ Schedule meetings for the employee’s first week, as needed</td>
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<td>□ Schedule/make time for 1:1 meeting with new employee for after orientation on employee’s first day</td>
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<td>□ Schedule a virtual or in-person team lunch, tour, or “meet and greet” for the employee’s first day</td>
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<p>| DAY 1                  | Suggested Agenda | 8:30-11:00 – <strong>Conduct Employee Orientation and obtain signed paperwork</strong>                                                                                                                                                  |
|                       |                   | <strong>Information to Review</strong>                                                                                                                                                                                                 |
|                       |                   | □ Overview of organization, mission, vision, values                                                                                                                                                                   |
|                       |                   | □ Org chart and contacts list                                                                                                                                                                                            |
|                       |                   | □ Overview of job description, program, and expectations                                                                                                                                                                |
|                       |                   | □ Employee handbook review/discussion                                                                                                                                                                                  |
|                       |                   | □ Safety/security review                                                                                                                                                                                               |
|                       |                   | □ Timekeeping expectations                                                                                                                                                                                              |
|                       |                   | □ Communication expectations                                                                                                                                                                                             |
|                       |                   | □ Training/onboarding review                                                                                                                                                                                            |
|                       |                   | □ Technology                                                                                                                                                                                                          |</p>
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<th>Paperwork</th>
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<tr>
<td>□ Handbook sign-off</td>
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<tr>
<td>□ Job description sign-off</td>
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<tr>
<td>□ Conflict of Interest Disclosure Form</td>
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<tr>
<td>□ Contact Form + Emergency Contact Form</td>
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<tr>
<td>□ Copy of driver’s license and vehicle insurance, if applicable</td>
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<td>□ Program paperwork</td>
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**11:00-11:30 - Break**

**11:30 – Meet 1:1**
- □ Tour offices, if applicable
- □ Reaffirm onboarding plan/checklist and offer support

**Noon – Welcome Lunch with Team and Supervisor (via Zoom for remote)**

### After Orientation
- □ Send orientation follow-up email with links to resources
- □ Schedule 30 day and 60-day check ins
- □ File paperwork and enter payroll
- □ Update org chart or contact list
- □ Continue introductions
- □ Schedule applicable trainings and meetings
- □ Complete workers’ comp new hire reporting

### 30 DAY CHECK-IN
- □ Check in with supervisor to see how things are going, answer questions, offer support

### 60 DAY CHECK-IN
- □ Check in with supervisor to see how things are going and to offer support
- □ Meet with employee to see how things are going and offer support
- □ Send employee a survey requesting feedback about orientation and onboarding