MONITORING & EVALUATION
Short Cuts

Guidelines for Hiring Strong Candidates

Hiring M&E Staff

September 2008

Introduction

This edition of *Short Cuts* provides guidance on identifying, recruiting, and hiring the right staff. Hiring is a strategically important process; it requires careful thought and a significant time commitment. The Hiring M&E Staff module provides generalized examples that can be customized to fit a specific context. The module's goal is to increase the quality of an organization's M&E activities by connecting the organization with the best-qualified candidates to meet its M&E needs. The module is organized into seven steps. Follow these steps to guide and support the M&E staff hiring process.

Note that it is important to follow applicable labor laws throughout the hiring process.

Step 1 Identify M&E Needs

A Participatory Process

Reviewing M&E needs should be a participatory process that includes M&E staff and representatives from various sectors. All available resource persons, including M&E technical advisors and headquarters-based M&E technical staff, should be engaged in this initial step and throughout the hiring process. This review is used to determine the organization's current M&E capacity and identify the activities that the M&E team would like to accomplish with increased capacity.

USAID FROM THE AMERICAN PEOPLE

CRS CATHOLIC RELIEF SERVICES

Ame i

Types of M&E Team Positions

In general, there are four types of M&E positions:

- **Level 4** is a senior regional position, housed within a regional office or a headquarters team. Level 4 staff have 5 to 10 years of technical experience and are responsible for conducting M&E training, designing surveys, analyzing data, and disseminating results and lessons learned. Level 4 staff are also responsible for the overall direction for strengthening M&E.

- **Level 3** is a senior country position. They provide the majority of in-country technical skills. Level 3 staff have 3 to 5 years of M&E experience and work to build the capacity of level 1 and 2 staff.

- **Level 2** is a mid-level country position. They participate in the design and implementation of M&E systems and activities, have 1 to 2 years of M&E experience, and manage level 1 staff.

- **Level 1** is an entry-level position. They have 1 to 2 years of related experience and are responsible for collecting field data and completing activity reports.

Hiring M&E staff involves:

- Collecting M&E job descriptions
- Using listservs to post job listings
- Developing questions to pre-screen candidates
- Developing interview questions
- Preparing M&E discussion points and tests for candidates
- Developing a matrix for shortlisted candidates

M&E Staff Funding

Before beginning the hiring process, determine if there is adequate funding for an M&E position. Contact the Human Resources Department to find out the available funding levels and the proposed salary range for the new M&E position. If there is not adequate funding or if the organization's M&E needs can be met by regional staff or with a consultant, follow the office protocols for obtaining this type of support.

Step 2 Create a Job Description

A job description states the job responsibilities and the experience required so potential employees know if their qualifications match the job requirements.

A useful job description includes the following information:

- **Organizational overview,** including the organization's history, mandate, and guiding principles

- **Description** of the job location

- **Focus areas,** including specific technical sectors

- **Purpose of the position**—for example to strengthen M&E capacity

M&E technical skills

- M&E plan development
- Tool design
- Participatory Rural Appraisal methods
- Sampling techniques
- Qualitative and quantitative data analysis

through a newly established M&E unit, or to provide technical support for ongoing M&E activities

- **Primary responsibilities** and the estimated amount of time to be dedicated to each task
- **Key tasks,** including activities and stakeholders, regions, and programs involved
- **Key working relationships** within the organization and with other stakeholders and partners
- **Qualifications**, both required and preferred, including technical skills, experience, language(s), educational level, expertise, and other qualifications relevant to the position
- **Description of the work environment**, including management responsibilities and travel time required.

Step 3 Create a Hiring Committee and Outline the Hiring Process

Hiring Committee

The hiring committee should include three to four members who each contribute skills and experience to the group. The committee chairperson should provide an added degree of overall coordination and be able to make decisions should disagreements arise among committee members. Specific tasks , such as posting the job advertisement, should be delegated to individual committee members. The committee should set a realistic timeframe to complete the hiring process; the timeline should take into account the urgency of the organization's M&E needs and current work demands of committee members. Follow a realistic timeline to help maintain a sense of momentum throughout the hiring process.

M&E and Listservs:

- American Evaluation Association: www.eval.org
- The Evaluation Center at the University of Western Michigan: www.wmich.edu
- Evaluation Network of Latin America and the Caribbean: www.lacea.org
- Relief Web: www.reliefweb.int/vacancies
- UK Evaluation Society: www.evaluation.org.uk
- DevNetJobs: www.devnetjobs.org
- Interaction: www.interaction.org

Step 4 Advertise for the Position

First, determine how widely the organization should advertise for the position. Positions can be advertised internally and externally, nationally and internationally. There are advantages and disadvantages associated with any approach. Advertising internally limits the search to candidates who are familiar with the organization and have a demonstrated ability in the organizational environment; it excludes candidates who are potentially better qualified. Advertising externally increases the applicant pool, but outside candidates are likely not to have as deep an understanding of the organization's internal operations.

Advertising internationally also increases the applicant pool, but it introduces additional complications and potential costs in the hiring process, including moving and relocation costs. Decide in advance whether or not the organization will fly in candidates from overseas.

Contact the Human Resources Department and follow their protocol to post the position internally. If posting the position externally, the Human Resources Department may have a current list of useful job sites and venues.

Generally, level 4 positions should be advertised internationally and externally, in addition to nationally and internally. Level 1, 2, and 3 positions are commonly limited to national advertising, either internally or externally.

> **Applications should include** a cover letter, a resume, and references. For level 2, 3, and 4 positions, a writing sample should also be included in the application.

Develop a summary job description that can easily be placed in magazines and newspapers. Internet sites can generally post full job descriptions. The summary description should state the minimum level of education and experience needed as well as key technical skills, job responsibilities, computer skills, and language proficiency, if relevant. Include the application requirements and the submission deadlines in the summary. If time permits, allow applicants at least one month to submit applications after the job has been posted.

Step 5 Review, Sort, and Shortlist Applicants

- **If you do not find an ideal candidate for the position**, consider re-advertising the position. Use your organization's regional and headquarters M&E staff and technical consultants until a better candidate becomes available.

- **Maintain good communication** with shortlisted candidates and inform them of any delays in the hiring process.

Review: Standard Criteria Check

A hiring committee member should review all applications according to standard criteria used to evaluate a candidate's qualifications. These criteria should include the required years of experience, education level completed, and technical skills that correspond to the job description.

Sort Applications into Groups

From this initial review, the committee should sort the applications into three groups: **group 1** applicants do not qualify for the job; **group 2** applicants meet some, but not all, of the minimum qualifications; and **group 3** applicants meet or exceed all the stated criteria.

Send group 1 applicants a letter thanking them for their interest and informing them that their application was not selected. Group 2 applications should be kept on file in case an ideal candidate is not found among the group 3 applications. Send a letter of receipt to group 2 applicants, but wait until the position is filled before thanking them for their interest and letting them know that their application was not selected. Group 2 applications may also be of interest in the future, when hiring for other M&E positions.

Committee members should review all group 3 applications, including the writing samples, and create a shortlist of three or four outstanding candidates. Create a matrix for committee members to rank each application according to specific criteria.

Prescreening

Prescreen shortlisted applicants with an initial call. Ensure that their desired salary range matches the budget and that they are still interested in the position given its location, especially if it is a hardship post, and given the required amount of travel. Also confirm that the applicants will be available to begin work on the anticipated start date. Schedule interviews with all shortlisted candidates interested in the position.

Step 6 Interview Candidates

In the remaining steps, the Hiring Module focuses primarily on level 2, 3, and 4 staff, given that the hiring process for these positions is more technically rigorous and M&E–specific than for level 1. Hiring for level 1 positions should closely follow your organization's standard hiring procedures for junior staff.

Develop Interview Questions

Convene a hiring committee to select the final interview questions and determine if any technical tests or discussions are to be included in the interviews. In addition to M&E–specific questions, the interview should include standard, more general, questions. Each committee member should assume responsibility for several questions during the interview.

Ask open-ended questions. Follow up with any questions that need more clarification by asking "How did you accomplish this?" or "Would you please elaborate?"

If you do not have any M&E staff on the hiring committee, find ways to include M&E staff in the recruitment process. M&E staff are better positioned to evaluate the answers to more technical questions.

- **Given that interviewees may have a limited background** on any local projects discussed, the questions raised by the applicants in these discussions may be equally interesting as the answers they provide, if not more so.

- **Note which interview questions worked well** and which were less useful. Share this feedback with the regional office to contribute to improved hiring practices.

Include technical tests and discussions when hiring level 3 and 4 staff. These discussions and tests should include, but not be limited to, designing M&E systems and activities and analyzing data. To determine an applicant's skill level in M&E design, consider asking each candidate to review and discuss an example of a logical framework planning tool from a project in the country program. In addition, consider including an indicator performance tracking table for the candidate to review and discuss. To test the candidate's analytical ability, provide him or her with qualitative or quantitative data well in advance of the interview so that s/he can become familiar with the data. As part of the interview, ask the candidate to comment on, or to develop, an analysis plan within a typical programmatic context.

To include a discussion of a current M&E issue in the interview, consult regional or headquarters-based M&E staff for examples of tests or discussions that have worked well in the past.

Interview Scoring Sheet

Provide each committee member with a scoring sheet to be used to evaluate the interviewee's responses. The hiring committee should include criteria in the scoring sheet that are most relevant to the position responsibilities and skills.

Structure the interview into four main components:

1. **Opening:** Introductions are made, and the committee presents a summary of the job description and clarifies the applicant's background according to the CV that was submitted as part of the application.

2. **Fact-finding:** The committee asks the interview questions and the applicant responds.

3. **Summary/Reflection:** Summarize the main points made by the interviewee.

4. **Closing:** This is an opportunity for the interviewee to provide additional information and to ask any further questions about the position or the organization.

After the interview, collect the candidate's scores from all committee members and identify the first and second choice candidates. Discuss these findings with the committee to ensure all members agree with the results.

Step 7 Hire & Orient New Staff

Check References

The Human Resources Department can help with this task.

- Create a standard list of questions for references.

- Follow up with the top candidate's references and ask each about the candidate's technical work, skills, and relevant strengths and weaknesses.

- Ensure that each type of reference is crosschecked.

- If the references provide positive feedback and instill confidence in the candidate, contact the Human Resources Department and ask them to offer the position to the candidate. However, if the references give negative impressions that make the hiring committee leader reconsider the candidate, it is advisable to reconvene the hiring committee to decide whether or not to proceed with hiring the second-choice candidate. If so, repeat the above process with the second-choice candidate's references.

- Continue this process until satisfied that the candidate is suitable for employment at your organization. For longer-term assistance from external TA providers, draft a SOW for the immediate tasks and build flexibility into the contract to allow for future task orders.

> - You may receive a negative impression from a reference, based either on what that person does or, equally important, does not say. **Try to read between the lines or ask additional questions to clarify unclear responses.**
>
> - **New staff** need to become familiar with each sector's programming and to develop strong working relationships with key staff in each sector.

Make an Offer

The Human Resources Department will send the selected candidate an offer letter that states the job title, salary, full range of benefits, stipulated length of contract (if any), and starting date. Once the candidate accepts the position, the hiring process is complete. Contact the remaining candidates, thank them for their time, and let them know that the position has been filled.

Orient New Staff

Provide the new appointee with standard orientation materials and arrange for him/her to spend a half-day or a day with staff in each sector. Include the new staff in any relevant meetings during their first weeks. It is ideal for the new staff to participate in an M&E activity, whether planning, data collection or analysis, during the initial weeks. After the first few weeks, check in to see if s/he is settling in well and address any questions that may have arisen.

The Hiring M&E Module includes the following annexes:

1. Job descriptions for levels 1 and 2
2. Summary job table
3. Listservs for job postings
4. Matrix for shortlisting
5. Pre-screening questions
6. List of interview questions for levels 3 and 4
7. Interview do's and don'ts
8. Examples of a results framework
9. Indicator Performance Tracking Table
10. Matrix for scoring interviews
11. Questions for references

This edition of Short Cuts was produced in 2008. Please send your comments or feedback to: m&efeedback@crs.org.

This publication is part of a series on key aspects of monitoring and evaluation (M&E) for humanitarian and socioeconomic development programs. The American Red Cross and Catholic Relief Services (CRS) produced this series under their respective USAID/Food for Peace Institutional Capacity Building Grants. The topics covered were designed to respond to field-identified needs for specific guidance and tools that did not appear to be available in existing publications. Program managers as well as M&E specialists are the intended audience for the modules; the series can also be used for M&E training and capacity building. The *Short Cuts* series provides a ready reference tool for people who have already used the full modules, those who simply need a refresher in the subject, or those who want to fast track particular skills.

The M&E series is available on these Web sites:

- www. crs.org/publications
- www.foodsecuritynetwork.org/icbtools.html
- www.redcross.org