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## Human Resources for the CAD Manager

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**CM319-1** This session will introduce some basic Human Resources (HR) concepts from recruiting to retention. With the fast pace of technology today, the cost of training and education is going up. It is becoming increasingly important that we hire the right people and then find ways to keep them. Learn what you can do -- regardless of how much authority you have -- to support these efforts. This class will give you the HR tools, methods, and insights so you can find and retain the right employees. If you are in any way responsible for the hiring decisions or the productivity of your team, then don't miss this session!

### **About the Speaker:**

Paul Kirill is the manager of Technical and Human Resources for HC Yu and Associates, consulting engineers in Richmond, Virginia. His technical duties include managing all things computer and CAD related; his HR tasks include bringing the concepts of organizational behavior, motivation, and training to an environment where these ideas are often overlooked. Paul has over 14 years of experience applying Autodesk products to a variety of industries, including technical theatre, industrial design, exhibit design, architecture, and MEP engineering. In addition to his "day job," he also provides CAD and CAD management training and consulting services to individuals and small businesses in the Richmond area. He is also a leader in the Richmond AutoCAD Manifest local users group.

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## INTRODUCTION

It doesn't matter what your firm does or which position you are looking to fill, hiring good people is expensive. Hiring the wrong person, however, is exponentially more expensive. Consider the quantifiable costs such as payroll, benefits, and recruiting costs – but then also consider lost time, missed or mishandled business opportunities, correcting mistakes, wasted training, team morale, and possibly worst of all – losing the “good hire” that might have been second or third down the list of potential candidates. It's difficult to put a dollar figure to those situations, but you have to agree they can be costly. As a CAD Manager, you have to recognize those “intangibles,” because they may be the only ones over which you have any control!

Anyone who has been in their field for a long time (15+ years) may remember a happier time for employers when hiring people with CAD skills was a relatively simple task. A simple ad in the Sunday paper brought in more responses than one person could get through, so you just picked a few that looked good, hired somebody after a cursory interview, and if they didn't work out you just worked your way down the list... Labor was cheap and CAD – and CAD Management – was pretty simple, wasn't it? Well, as you have probably noticed, times have certainly changed. While there is still a relatively large pool of people with basic CAD skills out there, CAD (and the world in general, but that's a different topic) has become much more complicated – deadlines are shorter than ever before, the “vertical” CAD products like ADT, ABS, Inventor, Revit, etc. require a greater understanding of the design process, the cost of labor keeps going up, etc. These factors have caused the pool of “qualified” people to shrink, making it much more difficult to find any candidates at all, let alone that “perfect candidate”. And just like anything else, the harder it is to find, the more expensive it becomes. And the more expensive something is, the more you have to be sure that it is the right thing.

But how do you know? How do you make sure the right person is the one that gets hired? The same way you make sure a project gets done and gets done right – you develop a process and you follow it. Every time. Sure, there will be some variation and improvisation from case to case, but the overall process remains the same. If you are fortunate (or unfortunate, depending on your point of view) enough to be in a position where finding the right people is part of your job, this session is going to help you understand what you need to do to develop your own process and help you avoid some of the common pitfalls that pop up along the way. Even if your company already has a documented hiring process, or your supervisor takes care of the hiring in your department, or you are the CAD Manager who has no authority or responsibility in the hiring arena, you can still use what you learn in this session to help develop a process that works for your situation.

Before we get into it, there are some questions you should ask yourself and keep in the back of your mind as we move forward. They will help you understand your place in the “big picture” and put into perspective the things we discuss later on. Let's call it your “Hiring Quotient” or HQ.

1. Do you believe people are the most important asset a company has?
2. Are you willing to take on additional responsibilities beyond those of the typical CAD Manager?
3. Do you believe that filling positions with the right people will improve everyone's performance?
4. Do you understand and support your company's strategic needs?
5. Are you reasonably familiar with you firm's current hiring procedure?

Hopefully you answered “yes” to all of the above. If not, you'll have some things to think about as we move along. There will be more HQ questions in the sections that follow so let's get started!



## PREPARATON

Before you jump right into searching for that perfect candidate, it is important that you stop and take a look around. You can't possibly know the perfect candidate when you see them without understanding what makes them "perfect". You need to have a clear picture of what your company has to offer, what part you play in the process, and what, exactly, this perfect candidate will be expected to do. All of this together is going to shape what "perfect" means to you.

1. Do you understand the concept of corporate culture and its importance in the hiring process?
2. Are you familiar with your company's mission statement?
3. Are you comfortable in your role and see where you can support the hiring process?
4. Can you put your hands on a current job description for your position?

**Step one is to assess your environment.** What kind of company do you work for? Every company has its own culture or personality which comes from the interaction, attitudes, skills, and behaviors of everyone in the company. Inside of the "corporate culture" you often find sub-cultures that formulate at the departmental level. In order for a candidate to be successful, they need to be able to integrate into your company's culture and/or sub-culture; or in other words, they need to "fit." Because it is derived from so many factors, it's difficult – if not impossible – to accurately document the real corporate culture. Your goal here is just to "get a good sense" of it – the stronger the better.

Start by reviewing your company's mission statement if they have one. While it is usually not a description of the true culture, it should provide you with some overall guiding principles. Think of it as a goal to shoot for.

Then take more a realistic look at the general attitude of those working around you. Is it a friendly bunch where people go out to lunch together, say hello in the mornings, gladly offer assistance when needed? Or is it an angry bunch of backstabbers always looking for the person next to them to slip up so they can point it out to the boss? Is your group competitive? What's the generational breakdown? Would you say people are satisfied or is there a lot of complaining around the water cooler? Then take a look at the physical environment. What's the dress code? Are you in a corporate-style office or is it more like a warehouse? What do people keep on their desks? How old are your computers? Now take a step back and look at the style of the company. Does management believe employees are assets or liabilities? Is the pace of work hectic/frantic or relaxed? What are the drivers – quantity, quality, dollars? Keep in mind that each new hire is a chance to gently change the existing culture – for better or worse.

There are no right or wrong answers to any of the above. You are merely taking an assessment of the current culture. The answers are going to be important later when you are reviewing resumes and interviewing candidates. If you are new to a company or just can't quite put your finger on what it might be – don't be afraid to ask. In the back of this handout, you will find some sample questions that can use to interview fellow employees as well as the company leadership. How formal you want to be with your questioning will depend on your current role. Which brings us to...



**Step two – Identifying your role.** Where do you fall in the grand scheme of things? Understanding that your title may be CAD Manager, I think we can all agree this title means very different things in different firms. To keep things clear, let's look at these definitions in terms of roles (not title) and you decide which role fits best:

#### Hiring Manager

You might be a Hiring manager if:

- You work with HR to determine hiring policies and create job descriptions
- You are responsible for finding and hiring new people
- You determine the needs
- You are in total control of the hiring process from start to finish
- You tell HR when to start the paychecks coming

#### Independent Manager

You might be an Independent manager if:

- You are integral to the hiring process
- You participate in recruiting efforts
- You interview preselected, qualified candidates
- You participate in defining job qualifications
- Candidates you recommend get the jobs

#### CAD Manager

You might be a CAD Manager if:

- You are at all involved in the hiring process
- You participate in resume review
- Hiring managers ask you to sit in on interviews
- Candidates you don't recommend don't get hired – those you do are likely to be hired
- None of the above, but somehow you are expected to make the zombies HR sends over productive

#### CAD Leader

You might be a CAD Leader if:

- You do not participate at all in the hiring process but wish someone would ask
- You understand the qualifications candidates should have better than those doing the hiring
- You are formally or informally responsible for the success of new hires

It is important that you understand your current role for a few reasons. Your level of success – and frustration – is going to depend on where you fit in the process and how much you can affect it. Obviously a Hiring Manager has the most control and thus the greatest level of responsibility. They are in a position to do the most good and the most damage. If you are a hiring manager and you do not have a good hiring procedure in place – there is a good chance you are part of the problem. The independent manager is in basically the same situation, but at least can say they didn't make the final decision if things don't work out. The CAD manager and CAD leader are the ones with their work cut out for them. If you are in one of these roles, you will need to take a hard look at that HQ question about additional responsibility because none of what comes next is in your job description.



**Step three is to identify the position.** What are we looking for or what need are we trying to fill? Hopefully your company has a complete, up-to-date, well thought out job description for every position. Unfortunately, it is usually a good bet that it doesn't exist or, if it does exist, it is terribly generic or inadequate. In any event, you need to get your hands on one and review it. If there isn't one for the position you want to fill, you need to create one. Job descriptions are your scope definition – imagine trying to design a building without even a loosely defined scope. You simply can't do it and you will never find the right candidate for the job if you don't know what the job is. A good job description gives candidates a clear understanding of the company's expectations and ensures everyone is on the same page.

Even a basic job description has to have a few critical components in order to be effective:

- Job Title – the title should be comparable to what other firms in your industry are using.
- Department or Division – if applicable, include the department. A CAD drafter with plumbing design skills might not be the best candidate to draft circuit board layouts.
- Title of the immediate supervisor
- Summary of duties and responsibilities – what will this person be expected to do on a day-to-day basis? Be specific in your description, but not so detailed that it becomes a laundry list of tasks.
- Job duties should be divided between “Essential” and “Non-essential” functions.
- Experience and/or educational requirements – be realistic. Don't shut out potential candidates with arbitrary requirements.
- Personal skills and attributes – don't be afraid to include a glimpse of your corporate culture here.
- Compensation range – this is really for internal use only. If you are going to give a copy of the job description to candidate, you may elect to leave it off.

Creating great job descriptions is not something that comes easy to everyone. I have included a few examples in the back of the handout to help you get started, but don't be shy about searching the internet for verbiage and formats that better suit your company's style.

One final note on Job Descriptions - During your review (or creation) of a job description, you may discover that the position you are describing is actually more than one position. One that seems popular, for example, is the CAD Manager/Designer. This person may be expected to spend, say, 80% of their time designing and 20% managing the CAD. As a company grows, these percentages may shift to 60-40, 50-50, 40-60, etc. until eventually they become two full time jobs. It's a good idea to prepare for this by creating a Hybrid Job Description. Basically you create two separate job descriptions and combine them in a third Hybrid. I mention it because this becomes important when considering compensation requirements for a job you certainly won't find on Salary.com.



## FINDING CANDIDATES

1. Are you comfortable networking and meeting new people?
2. Do you know the difference between an Active and Passive candidate?
3. Have you ever considered alternatives to “full time” and how it could work in your environment?
4. Does your company have an Employee Referral program?
5. Are you in a position (formal or informal) to encourage others recruit for your firm?

Finding candidates used to be so easy – an ad in the paper or a few phone calls around town and in short order you had the position filled. Ah, those were the days... In today's market it is much harder and more complicated to find the right people to fill jobs. Many factors contribute to this and they may be more or less applicable in your industry or geographic region. Here are a few that seem to be universal:

- Law of supply and demand – there are simply more jobs and fewer qualified people
- Jobs are more complex or specialized – vertical CAD products require specialized knowledge, shorter project time lines require production drafters to also be designers, designers also have to be project managers, etc
- Shifting focus on retention – companies are recognizing the shortage in labor and are working harder to keep who they've got
- A bird in the hand worth two in the bush – the condition of the overall economy keeps employees where they are – not willing to risk change

The bottom line is that it is an Employee's Market. Good candidates have become “passive candidates” which means they are not actively seeking new or better opportunities like they used to...

So what is the best way to find and attract them these days? Well, there is no one, best way. Most likely, it is going to take a strategy of combining the approaches that give you the best return for your recruiting time and dollar. And your strategy is going to change depending on the type of candidate you are looking for. The way you go about finding a CAD Operator will not be the same as when you go after a Senior Engineer. When developing your recruiting strategy, you should also be thinking internally – considering alternatives to the typical “full time” employee. For whatever reasons, there are good candidates that don't want or need full time or long term employment. Conversely, the ability to offer short term or contract-to-permanent positions to marginal candidates is the best way to protect your investment. Your ability to be flexible in the work style of the position will impact the effectiveness of some recruiting methods outlined below. Another factor to consider before you go looking for candidates is distance. Keeping in mind that long distance candidates cost more than just the new hire relocation package - increased advertising costs, flying people in for interviews, travel to out-of-state colleges or career fairs... How far are you willing to go to bring in qualified candidates?

If you feel you have considered the issues above and are ready to address your recruiting strategy, take a look at the list below.



## Advertising

Newspapers (local or long distance) are probably the most popular method advertising for local jobs. Always ask about “packages.” Most newspapers will offer multi-day packages, inclusion in an employment insert or separate publication, or an online posting for not much more than a single Sunday ad. Most papers charge by the word or line so to keep costs down, consider using that ad to direct people to your website where you have a much more detailed (and free) posting. If you decide to put ads in out-of-town papers, it’s a good idea to ask about their circulation numbers.

Online ads will certainly reach a wider market than a localized print ad. Because of this, they are typically have higher up-front costs. Services like Monster.com or CareerBuilder are not cheap, so be sure to take advantage of their customer service. Typically, they are thrilled to spend time teaching you how to most effectively search their resume database, write an effective job posting, etc. There are also many industry specific sites out there to choose from. Some of these sites are more popular than others, so take a good look before you buy. Search the existing job postings to see how closely they match your industry and how recent they are. Don’t just sign up online, call so you can ask questions – how many resumes were posted in the last 30 days? How many in your country or region? And don’t forget Craigslist.org! It’s free in most cities and, personally, the one I’ve had the greatest success with.

## Recruiters

I know that in many circles, “recruiter” is a bad word. I believe this stems from the fact that the term “recruiter” is used interchangeably with “placement agency” and/or “staffing agency” – and the fact that there are so many horrible recruiters out there. However, if you’re looking for senior level staff, looking nationwide for talent, or trying to fill a highly specialized position, you will save yourself time and headache by finding a recruiter (or recruiters) you can work with. Don’t be afraid to interview recruiters and ask for references. Once engaged, a recruiter is a representative of your firm. A pushy recruiter that makes promises to candidates that you can’t keep does more harm than good. A true recruiter or recruiting agency understands your industry and the types of positions you will be filling. They will take time to get to know you, your firm, and the hidden details of the position. They will actually work hard to send you candidates that suit your needs and will be a fit with your firm. A handy side effect is that an ethical recruiter will place your firm on a “do not call” list once they are doing business with you or have placed someone with your firm. No doubt recruiters are pricey. If you are not the Hiring Manager, you need to get a commitment from your firm’s management before engaging a recruiter. The last thing you want to do is “go down the road” with a candidate only to find that your firm refuses to pay the recruiting fee. And regarding the fee, expect to pay between 15% and 25% of the first year’s salary. Some recruiters want a percentage of everything – salary, bonus, sign-on bonus. Some want up to 35%. Don’t be afraid to negotiate!

Someone who searches a massive database and sends you resume after resume that are off target, hoping one of them will be good enough or close enough is not a recruiter. Quite frankly they are a waste of time and a pain in the butt. But then again, people win the lottery all the time so it’s probably worth a few minutes to review the resumes they send. Bear in mind that if you have signed an agreement with them, they will typically “own” any resumes they send you for at least a year.



### Career Fairs

I consider career fairs to be more of a marketing opportunity than a great place to meet candidates. They also give you a chance to see who your competition is and what they have to offer. Because they will be checking you out as well, some thought needs to go into how you will present your firm.

### Government Resources

Most states and local governments offer job boards of some kind in support of local businesses. The postings are usually free. Additionally, you may also find that your state offers specialized placement incentives if you hire people from a state training program, for example.

### Associations

Every industry has professional associations. Many of these offer some kind of job board or resume database. Some are free, some require membership, some ask for a separate fee. The first step is to check and see if your firm, or someone in your firm, is already a member. Beyond that, the same rules apply to these services as the other online services mentioned above – search the existing database, ask questions, etc. If they don't have an online job board, they might have a local chapter. Don't be shy about going to the meetings.

### Referral Program

Most HR professionals will tell you that the largest percentage of good hires come from referrals from existing employees. If your company does not have a formal employee referral program, it needs one – if for no other reason than hiring someone through an employee referral is (probably) cheaper than a recruiter or even online advertising. And it is very easy to do. All you need is a form for tracking the referrals and a simple policy stating the payout and any caveats or restrictions (must stay employed for 90 days, no referrals from XYZ Company, etc.). To make the program really pay off, offer other incentives to get your employees out of the office and networking – association lunches, local user group meetings, golf outings, etc.

### Educational Institutions

If you are fortunate enough to have a college in your area that turns out graduates with degrees in what you do, then odds are there is a placement department in that college whose purpose is to get those students jobs. You need to find that department. Even if they do not have an active job board, you should be able to get on a list of local firms. You won't find a more "active candidate" than a soon-to-be college graduate! And don't forget about the alumni associations with their massive student directories. While these are typically available only to other alumni – be creative. You probably already have an alumnus on staff, so remind them of the referral bonus and put them to work.

Once you have selected your initial recruiting strategy, it is important that you track your success. If you put an ad in the paper and no one responds, it's probably not a good idea to do it again. You can do this simply in a spreadsheet or notebook. What you are looking for is the number of qualified resumes received per dollars spent. The key word is "qualified" – if you receive 100 resumes in response to an online ad, but only two relate in any way to the job you posted then, again, you need to rethink your strategy. If you have an HR department, they may already be doing this so check with them to see what's worked and what hasn't – keeping in mind that just because it didn't work before doesn't mean it won't work now with your help. It just means it will be harder to justify...



## CANDIDATE SELECTION

If the recruiting effort has paid off and you are lucky enough to have a big stack of applicants this is where the fun begins. Okay that was a little bit of a lie. Your company is getting ready to make a huge decision. Maybe you are the one making the decision or maybe you have a smaller role in the decision making process – regardless, you should be a little nervous. Think about it – your company is going to make a pretty big investment and someone's life is going to change. All the work you've done so far comes down to this – the hiring decision. Thankfully (hopefully) it's almost over. Review some resumes, meet some people, do a little follow up, make an offer and get on with your lives. Simple!

1. Do you keep resumes “on file” even if the candidate didn't get the job?
2. Do you spend at least 30 minutes preparing for an interview?
3. Do you evaluate candidates immediately after the interview?
4. Do you know there are things you cannot ask someone in an interview?
5. Do you check references?

Personally, I think resume review is all about common sense. If you have completed the preliminaries outlined earlier, then you should have a good understanding of what makes a “good candidate.” It's up to the candidates to communicate their qualifications to you. If their resume is sloppy, vague, full of typos, or shows big gaps between employment odds are good they are not going to make a great addition to the team. But as I mentioned before, people win the lottery all the time so you should not automatically dismiss a resume because of these issues. Use common sense. If the resume is a true winner - it shows experience and education that exactly match your job description, previous employers closely match the size and business of your firm, the resume and cover letter are well written and formatted – put it in “must call stack” and move on to the next. If you come across one that is not clearly a winner, but does match the job description, put it in a “needs further review” stack. Go back to that stack if none of your “must call” candidates pan out. When you hit one that has nothing to do with the job description – put it in a “thanks but no” pile.

Notice that with that last one I didn't say to pitch it. It's a good idea to keep a log of the resumes you receive, if not the resumes themselves – after all you paid for them in one way or another. Even if you know a candidate is not qualified for the current opening, they may be qualified for something else down the road. You especially need to track resumes received from recruiters. An agreement with a recruiter typically includes time period (usually 12 months) where a resume they send you is active. Maybe the candidate was solid but didn't make the cut this time. If you decide to hire them 6 months later, you may still be obligated to the recruiter - even if the candidate sends you their resume directly as a result of a new search. The same should probably hold true for your employee referrals. Another reason to keep a log is that we forget. For example, a candidate comes to you with a great resume, but during the interview you discover that, well, this is a crazy person. A year from now, you probably will not remember their name – but it will all come crashing back to you when see them waiting in the lobby. (Just take my word on that one...)



The resume review process is pretty simple if for no other reason that it is the last part of the hiring process where you don't have the feds looking over your shoulder. Once you get to the interview process there are guidelines and rules that must be followed or you can get into some serious trouble. What I am going to offer here are the basics – and the advice that you check out [www.eeoc.gov](http://www.eeoc.gov), specifically the sections pertaining to interviewing and discrimination.

Before we dive in, we need to go over some rules of interviewing:

1. Avoid questions that will get you in trouble. During an interview you are not allowed to ask questions about national origin, the candidate's age or birth date, their religion, marital status, if they have children, race, gender or sexual orientation, a disability or handicap, graduation date (a sneaky way to determine age), if they ever been arrested (unless it is for the purpose of determining eligibility for security clearance required for the job), or if they own or rent their home. In general it is a bad idea to probe into someone's personal life during an interview – stick to the job requirements.
2. Let them speak. Remember that the purpose of an interview is to assess the candidate's qualifications and suitability for the job. How can you learn anything if you are the one talking all the time? The candidate should be talking for at least 80% of the interview.
3. Stay in control. Make sure the 80% is in response to your questions, not a rambling life story.
4. Take notes. You don't need to transcribe the entire conversation, but at least jot down highlights and surprises.
5. Don't ask the same questions at every interview, but do ask the same types of questions. Every interview is going to be a little different because candidates are different. However, they should all have the same flow and cover the same ground. Otherwise you never get an "apples-to-apples" comparison between candidates.
6. Avoid an arsenal of questions with yes or no answers. Remember your goal of getting them to talk. Keep your questions open ended and avoid leading questions.
7. Be a good listener. Don't interrupt unless you feel a ramblin' coming on. If a candidate is nervous, let them talk it out. Interrupting them or offering suggestions will only make them more nervous.
8. Have a plan. You should go into an interview with some idea of what you expect to get out of it. You should have reviewed the candidate's resume, the job description, your list of standard questions, and formulated any specific questions for this candidate before going into the interview. If you are part of an interviewing panel, make sure everyone is on the same page and understands the plan.
9. Consider the environment. Hold interviews in a quiet, neutral part of the office like a conference room. Close the door and let others know what you are doing in order to avoid distractions and interruptions. For phone interviews, do not use a cell phone.
10. Leave them wanting more. Every candidate you interview should leave wishing they could work for your company. If, during the course of the interview, you discover inconsistencies (or bold face lies) in their resume or that their qualifications don't stack up, do not give in to the desire to call them on it. Simply make note of it and wind down the interview. If they are the perfect candidate, resist the urge to make an offer on the spot. It makes you look desperate and that's not attractive.



Now that you know the basic rules, let's look at the process.

The first step should be a preliminary telephone interview. While this is typically standard procedure for out-of-town candidates, many people skip this step for local candidates. I encourage you to embrace it. Time is money, and a preliminary phone interview gives both parties an opportunity to learn more about the other without taking time off work. It also shows a candidate that you consider their time just as valuable as yours. While the bulk of the preliminary phone interview is dedicated to verifying information, filling in any gaps in the resume, and getting a "feel" for the candidate. Use the phone interview as an opportunity to "sell" the firm and give them an idea of your corporate culture – get the candidate excited about the prospect of a face to face interview. It is also the best place to ask some "make-or-break" questions - can you relocate, travel, have the degree, etc. During the phone interview, you may decide the candidate is not quite what they represented on their resume and that's fine. But if they do shine in a phone interview and you move forward with the onsite interview, much of the preliminaries are out of the way and the candidate will typically be less nervous (if not excited), which means the onsite interview will be more productive. Not to mention phone interviews are great practice for someone who has not conducted a face-to-face interview.

The obvious next step is the face-to-face interview. Be prepared, be polite, but don't be afraid to probe. This is what it is all about – finding out as much about a candidate as possible. And this may come as a shock to the CAD Managers, but how much or how little someone knows about the inner workings of AutoCAD actually tells you very little about the type of person they are. CAD can be taught to someone who is willing and able to learn. This is what you should be trying to pull out the candidate. And let's be honest, whatever you're doing now is going to change in a year. So what good is it to hire someone who knows "everything" now but has no interest in learning more?

A good interview has a flow:

- Preparation – your review of the job requirements and candidate resume, build your list of questions, schedule the interview
- Opening – introduce yourself and any others in attendance, make a brief statement about the company, describe the position and/or have candidate review the job description, communicate the agenda and time frame
- Body – ask questions, listen, take notes
- Close – answer questions, discuss the next steps
- Follow-up – document the results of the interview, analyze and compare results. If the candidate is the right one, set up the 2<sup>nd</sup> interview and/or check references. If they are not the right one, write the thank you letter.

The Preparation should be done earlier, but the Follow-up should be completed right after the Close of the interview. It's important to get all your thoughts and impressions documented before your mind begins to wander back to the daily grind. More importantly in today's market it is crucial to respond to an interview as quickly as possible. If they are not the right candidate, send them a polite thank you letter informing them they will not be getting the job. It's amazing how many people skip this step and, frankly, it's rude. Not only that, people talk and people who feel slighted talk to everyone. If you feel the candidate is worth an offer letter, the impulse is to get it drawn up and get it sent. If they are as good as you think they are then odds are good that your offer won't be the only one they receive. Making the offer is fine as



long as you make it contingent on a satisfactory reference check. Since this can be a little awkward, it's usually best to wait until after you've checked the references.

Checking references is pretty harmless as long as you continue to stick to job related questions and steer clear of potential discrimination issues. There are a lot of myths surrounding reference checks. Perhaps the most popular being "All you will get is name, rank, and serial number." In truth, that's all you should give when you are called as a reference for someone else but this is completely different, isn't it? Here are a few tips for getting the reference information you need:

- Always use the phone. Asking for something in writing or in an email is going to get a limited response, if any.
- If the candidate is going to report to you, you should make the call. If you are in the CAD leader role, consider asking candidate's future boss to make the call.
- Be respectful of the reference's time. Plan on no more than 15 minutes and let the reference know that you do not plan to tie up half of their afternoon.
- Ask questions that incorporate some of the candidate's responses from the interview.
- You are not limited to only the references the candidate gives you. While it is usually bad form to call the current employer without the candidate's permission, you can contact previous employers to verify dates, salary, job title, etc.
- Don't forget to call the school. Most colleges and universities will confirm attendance and degree status. At the very least you should check to see if the school exists.

In the back of the handout is an example interviewing guide that should help you to conduct consistent interviews as well as some sample questions and thank you letter. And once again, your HR department may already have something similar. You should check with them first...

Assuming the candidate has passed the reference check, it's time to make an offer. An offer letter is an official legal document and should be run through the appropriate channels. The laws differ from state to state, but I can offer a few pointers on what to include in an offer letter:

- Job Title and basic responsibilities
- Compensation
- Summary of benefits
- Start date
- Time limit for responding to the offer

Another key point that bears mentioning is that you should always avoid any implication that the offer is an employment contract. For example, give salary in terms of "pay period" and not "annual salary" which may imply a one-year contract. Again, laws vary from state to state so check your local listings. In some cases, for whatever reason, the offer letter might be delayed. If you are so authorized, do not hesitate to give the candidate a call to let them know an offer is coming and to go over the terms. Even if you are holding the letter in your hands you may find that a phone call shortcuts time consuming negotiations. Once the offer has been agreed upon, all you have to do now is sit back and wait for the answer. But while you're waiting it's a good idea to start thinking about how you're going to keep them...



## SUMMARY

By following a well defined, well thought out process you will be much more successful in finding the “right” candidates. There is no one thing that can determine what makes someone “perfect for the job”. Instead it is a combination of experience, personality, situation, and timing... If you are in a position where you are responsible for making hiring decisions, it is important that you examine all of these factors when evaluating candidates – don’t limit your evaluation to how much they’ve done or how much they know. The best way to keep someone is to hire someone that won’t want to leave. If you match candidates to your environment, work style, and culture as well as to the job description – that is the kind of person you will get.

For those with less authority, hopefully you can see there are many opportunities for you to influence the hiring process. It doesn’t take any authority at all to understand the corporate culture, create a realistic job description (no matter what is actually on file), or do some recruiting. If you are willing to ask for a little extra responsibility (what are you doing between midnight and six anyway?), you can work your way into resume review, interviews, reference checks, etc. With a little effort and preparation on your part, you can make a difference that will ultimately make your job easier.

Use this guide in the manner it was intended – as a reference and introduction to developing a process to help you be A) more successful in finding good people or B) figure out what you can do to help make sure the people you find are the right people. Take a few minutes to review your Hiring Quotient and see how far you’ve come. In the appendix, you will find some good references and tools to take you a little farther.



## APPENDIX

- I. References
- II. Culture Questions
- III. Sample Job Descriptions
- IV. Simple Resume Tracking Sheet
- V. Sample Interview Questions
- VI. Illegal Interview Questions
- VII. Sample Interview Guide
- VIII. Sample Reference Check Form



## **APPENDIX I – References**

### **On the Web**

Society for Human Resource Management – [www.shrm.org](http://www.shrm.org) (membership required)

PSMJ Resources, Inc – [www.psmj.org](http://www.psmj.org)

Axiom AEC Business Webinars - <http://www.axiumae.com/sales/webinars/>

US Department of Labor – [www.dol.gov](http://www.dol.gov)

Bureau of Labor Statistics – [www.bls.gov](http://www.bls.gov)

BLS Compensation Survey - <http://www.bls.gov/ncs/home.htm>

US Equal Employment Opportunity Commission – [www.eeoc.gov](http://www.eeoc.gov)

Federal Laws Prohibiting Job Discrimination Q&A - <http://www.eeoc.gov/facts/qanda.html>

Online Recruiters Directory - <http://www.onlinerecruitersdirectory.com/>

Searchfirm.com - <http://www.searchfirm.com/search/search.asp>

Salary.com – [www.salary.com](http://www.salary.com)

Employment Laws Assistance for Workers and Small Business – [www.dol.gov/elaws](http://www.dol.gov/elaws)

ADA Document Center – [www.usdoj.gov/crt/ada](http://www.usdoj.gov/crt/ada)

Workforce Online – [www.workforceonline.com](http://www.workforceonline.com)

America Society for Training and Development – [www.astd.org](http://www.astd.org)

Human Resources on About.com - <http://humanresources.about.com/>

AllBusiness.com HR Section - <http://www.allbusiness.com/human-resources/2976216-1.html>

Dilbert on the Web - <http://www.dilbert.com/>

Richmond AutoCAD Manifest – [www.ramlug.org](http://www.ramlug.org)

### **In Print**

*Essential Managers Series*, DL Publishing – [www.dk.com](http://www.dk.com)

*How to Make Performance Evaluations Really Work*, Glenn Shepard, Wiley (July 2005)

*Hiring and Keeping the Best People*, Harvard Business School Press, HBS Press (January 2003)

*Ask the Right Questions Hire the Best People*, Ronald W. Fry, Career Press (October 1999)



## Appendix II – Culture Questions

Questions to ask yourself:

- How is the space allocated? Where are the offices located?
- How much space is given to whom? Where are people located?
- What is posted on bulletin boards or displayed on walls?
- What is displayed on desks or in other areas of the building? In the work groups? On lockers or closets?
- How are common areas utilized?
- What interaction between employees do you see? How much emotion is expressed during the interaction?

Questions to ask your coworkers:

- What 10 words would you use to describe your company?
- What's it really like to work here? Do you like it here?
- Around here, what is really important?
- How are employees valued around here?
- What skills and characteristics does the company value?
- Do you feel as though you know what is expected of you?
- How do people from different departments interact?
- Are there opportunities for further training and education?
- How do people get promoted around here?
- Around here what behaviors get rewarded?
- Do you feel as though you know what's going on?
- How effectively does the company communicate to its employees?
- What would you tell a friend about your organization if he or she was about to start working here?
- What is the one thing you would most like to change about this organization?
- Who is a hero around here? Why?
- What is your favorite characteristic that is present in your company?
- What kinds of people fail in your organization?





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### **Appendix III – Sample Job Descriptions**

- i Detailed Job Description – Senior Engineer
- ii Simple Job Description – CADD Operator
- iii Hybrid Job Description – Manager of Technical and Human Resources



Title: Senior Engineer

Revised:

Reports to: Engineering Manager

Salary Range:

Type: Exempt

Department:

---

**General Description**

The Senior Engineer acts as the team leader on multiple concurrent projects as assigned by the Engineering Manager. He/she may oversee the entire design process or assist as a technical expert on a specialized design. The Senior Engineer has gained extensive experience in all areas of engineering design relevant to their discipline and demonstrates exceptional leadership ability.

**Relationships**

- Reports to Engineering Manager
- Leads Engineers, Designers and Engineering support staff relative to project completion.
- Works alongside various Project Managers according to assignment.
- Will often serve as contact with client, other design professionals and contractors.
- When in role of project engineer, will coordinate and schedule work of project team in order to complete discipline specific tasks.
- May be asked to assist in performance appraisal of project team members.

**Qualifications**

- Knowledge, skills and abilities
  - Ability to communicate effectively, both verbally and in writing.
  - Ability to establish and maintain effective working relationships.
  - Demonstrated ability to lead a team of technical employees.
  - Working knowledge of CAD tools and other productivity software.
  - Thorough knowledge and understanding of applicable building codes.
  - Work requires willingness to work a flexible schedule.
- Education
  - Graduation from a four-year college or university with a Bachelor's degree in engineering.
- Experience
  - Seven years of experience in a technical and administrative capacity in a design firm or any equivalent combination of education and experience.
- Registration/certification
  - Professional Registration is required and a moderate to high level of participation in a professional association is expected.

**Responsibilities**

- Time Allocation
  - Projects: 80%
  - Administration: 10%
  - Marketing: 10%
  - Or as otherwise determined by the Board.

*The following duties are typical of the position but are not all encompassing. Each person is expected to help out in whatever duties are required to deliver a quality product on schedule.*

**Essential**

- Assess the requirements of a project, break a project into component tasks, and work with a Project Manager and Department Head to understand scope of work, budget and staffing.
- Prepare engineering studies and schematic design for new systems and analyze operation of existing systems.
- Prepare engineering analysis of projects to include: preliminary design, calculation, life cycle cost and equipment selection.

Title: Senior Engineer

Revised: 4/5/2007

- Assign and review work of project design team. Monitor progress of work and alert Project Manager to change of scope or additional services.
- Coordinate all aspects of project document completion within company and externally with clients and other design professionals.
- Prepare or review budgets based on experience and scope of project.
- Promote use of and participate in development of company design and production standards.
- Review of construction documents prior to final review by Engineer of Record.
- Assist in the education and development of design staff and act as resource for design questions.

**Non-Essential**

- Preparing project documentation using AutoCAD, AutoCAD MEP or Revit MEP
- Performing job site surveys

**Authority & Accountability**

- Resolves day-to-day problems of mostly technical nature.
- When serving as a project engineer, accountability includes meeting schedule, budget, and quality requirements.
- Responsible for overall design integrity and document quality of assigned projects.
- May not change scope of work without approval of Project Manager.

**Working Conditions**

- Working conditions are normal for an office environment. Work requires local travel and possibly some overnight travel. May require evening and weekend work.

## **COMPUTER-AIDED DRAFTING OPERATOR**

**Purpose of Position:** This is an entry-level position for a person with a basic operational understanding of CAD, but with no practical mechanical or electrical drafting experience.

### **Typical Duties**

The following duties are typical of the position, but are not all encompassing. Each person is expected to help out in whatever duties are required to deliver a quality product on schedule.

1. Works from detailed sketches to produce computer-generated graphs, charts, overlays and simple isometric drawings.
2. Maintains neat and orderly work area which will allow access to project information to other team members.
3. Assignments of increasing difficulty will be submitted as proficiency is increased.
4. Can analyze sketches, notes and other input material to determine the best approach for the completion of drawings.
5. Understands and follows the company's standard CAD procedures for layering, etc., and standard drawing procedures for sheet layout.
6. Individual is flexible and may work with numerous project teams to help in project completion.
7. Coordinates details and dimensions between drawing sheets.

### **Limits of Authority**

1. Has no authority. All work is closely checked by others.
2. Keeps Project Manager aware of work load and requests work when needed.

### **Relationship to Others**

Under general supervision of Designer and/or Engineer. Work assignments, answers to design questions and instructions would be provided by the Designer and/or Engineer. Has limited interaction outside of the project team. Must be good listener and follow instructions.

### **Knowledge and Experience Required**

1. No previous technical design experience.
2. A basic understanding of CAD terminal operation and AutoCad software operation obtained from experience or schooling.
3. At minimum, a high school diploma or GED is required.



# Job Description for Manager of Technical and Human Resources

## Accountable to:

COO, Director of Human Resources

## Summary of Purpose:

This multipurpose, non-exempt position combines related duties and responsibilities of Information Services Manager, CAD Systems Manager, and Human Resources Coordinator with the intent of bridging the gap between the technical and human aspects of the organization.

## Education and Experience:

- Graduation from a four-year college with a degree supporting one of the major roles.
- 2-4 years experience in one of the major roles.
- Must demonstrate additional experience in the other roles.

## Description of Roles:

### Information Services Management (Percentage of overall: 40%)

Identify, analyze, evaluate and act upon opportunities to use information technology to improve operational efficiency. Generally responsible for the maintenance, improvement and security of all computerized and communication systems, providing general hardware and software support to all staff members, design and specify systems based upon needs, and implementing all aspects of office automation.

#### Specific Responsibilities:

1. Recommending annual overhead budgets for all IS activities.
2. Approving IS related purchases up to \$1000.
3. Recommending IS related purchase above \$1000 to Executive Committee for approval.
4. Providing ongoing hardware and software installation, upgrades, support, and training.
5. Monitoring and maintaining companywide network and related systems.
6. Working with engineering staff and management to evaluate current and proposed technologies for all services.
7. Working with engineering and management to design and implement strategic information technology.
8. Ensuring the security of company data against virus, theft, or major disaster.
9. Issuing and enforcing policy regarding the use of company data, internet, and technical systems.
10. Developing and maintaining internal and external websites.
11. Maintaining hardware and software inventory.
12. Supervising IS support staff.

### CAD Systems Management (percentage of overall: 40%)

Maintain, provide user support, and oversee all aspects of Computer Aided Design and Drafting operations. Generally responsible for company CAD standards, software installation and upgrades, user orientation and training.

#### Specific Responsibilities:

1. Ensuring the ongoing development, documentation, and communication of company CAD standards.
2. Coordinating project setups and background updates.
3. Providing ongoing personal development and training for CAD staff.
4. Acting as CAD liaison between engineers and clients as needed.
5. Monitoring industry standards and trends as they apply to production.

6. Providing immediate CAD support to CAD staff.
7. Evaluating new CAD related software and hardware technologies.
8. Developing new software applications and tools to enhance productivity.

**Human Resources Management** (percentage of overall: 20%)

Support/manage functional areas of HR including recruitment, employee relations, job evaluation, compensation, and training. Develop and implement HR policies and procedures.

Specific Responsibilities:

1. Supervising system for incoming resumes, tracking, interviews
2. Organizing and administering new hire orientation.
3. Identifying and pursuing recruiting opportunities
4. Developing and implementing HR management policy regarding recruiting, interviewing, and evaluations.
5. Assisting with development of job descriptions for all employees.
6. Monitoring overall employee morale
7. Performing and documenting initial hiring interviews for all potential new employees.
8. Performing and documenting exit interviews.
9. Supporting Director of HR as required



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**APPENDIX IV – Simple Resume Tracking Sheet**









## **APPENDIX V – Sample Interview Questions**

### **WARM-UP QUESTIONS**

- What made you apply for this position?
- How did you hear about this job opening?
- Briefly, would you summarize your work history & education for me?

### **WORK HISTORY**

- What special aspects of your work experience have prepared you for this job?
- Can you describe for me one or two of your most important accomplishments?
- How much supervision have you typically received in your previous job?
- Describe for me one or two of the biggest disappointments in your work history?
- Why are you leaving your present job? (or, Why did you leave your last job?)
- What is important to you in a company? What things do you look for in an organization?

### **JOB PERFORMANCE**

- How did your supervisor on your most recent job evaluate your job performance? What were some of the good points & bad points of that rating?
- When you have been told, or discovered for yourself, a problem in your job performance, what have you typically done? Can you give me an example?
- Do you prefer working alone or in groups?
- What kind of people do you find it most difficult to work with? Why?
- Starting with your last job, tell me about any of your achievements that were recognized by your superiors.
- Can you give me an example of your ability to manage or supervise others?
- What are some things you would like to avoid in a job? Why?
- In your previous job what kind of pressures did you encounter?
- What would you say is the most important thing you are looking for in a job?
- What are some of the things on your job you feel you have done particularly well or in which you have achieved the greatest success? Why do you feel this way?
- What were some of the things about your last job that you found most difficult to do?
- What are some of the problems you encounter in doing your job? Which one frustrates you the most? What do you usually do about it?
- What are some things you particularly liked about your last job?
- Do you consider your progress on the job representative of your ability? Why?
- If I were to ask your present (most recent) employer about your ability as a \_\_\_\_\_, what would he/she say?

### **EDUCATION**

- What special aspects of your education or training have prepared you for this job?
- What courses in school have been of most help in doing your job?

### **CAREER- GOALS**

- What is your long-term employment or career objective?
- What do you feel you need to develop in terms of skill & knowledge in order to be ready for that opportunity?
- How does this job fit in with your overall career goals?
- Who or what in your life would you say influenced you most with your career objectives?
- What might make you leave this job?



## APPENDIX V – Sample Interview Questions (cont'd)

### SELF-ASSESSMENT

- What kind of things do you feel most confident in doing?
- Can you describe for me a difficult obstacle you have had to overcome? How did you handle it?
- How would you describe yourself as a person?
- What do you think are the most important characteristics & abilities a person must possess to become a successful? How do you rate yourself in these areas?
- Do you consider yourself a self-starter? If so, explain why.
- What things give you the greatest satisfaction at work?
- What things frustrate you the most? How do you usually cope with them?

### CREATIVITY

- In your work experience, what have you done that you consider truly creative?
- Can you think of a problem you have encountered when the old solutions didn't work & when you came up with new solutions?
- Of your creative accomplishments big or small, at work or home, what gave you the most satisfaction?
- What kind of problems have people recently called on you to solve? Tell me what you have devised.

### DECISIVENESS

- Do you consider yourself to be thoughtful, analytical or do you usually make up your mind fast? Give an example. (Watch time taken to respond)
- What was your most difficult decision in the last six months? What made it difficult?
- The last time you did not know what decision to make, what did you do?
- How do you go about making an important decision affecting your career?
- What was the last major problem that you were confronted with? What action did you take on it?

### RANGE OF INTERESTS

- What organizations do you belong to?
- Tell me specifically what you do in the civic activities in which you participate. (Leading questions in selected areas. i.e. sports, economics, current events, finance.)
- How do you keep up with what's going on in your company / your industry/ your profession?

### MOTIVATION

- What is your professional goal?
- Can you give me examples of experience on the job that you felt were satisfying?
- Do you have a long & short-term plan for your department? Is it realistic?
- Did you achieve it last year?
- Describe how you determine what constitutes top priorities in the performance of your job.

### WORK STANDARDS

- What are your standards of success in your job?
- In your position, how would you define doing a good job? On what basis was your definition determined?
- When judging the performance of your subordinate, what factors or characteristics are most important to you?



## APPENDIX V – Sample Interview Questions (cont'd)

### LEADERSHIP

- In your present job what approach do you take to get your people together to establish a common approach to a problem?
- What approach do you take in getting your people to accept your ideas or department goals?
- How frequently do you meet with your immediate subordinates as a group?
- What sort of leader do your people feel you are? Are you satisfied?
- How do you get people who do not want to work together to establish a common approach to a problem?
- If you do not have much time & they hold seriously differing views, what would be your approach?
- How would you describe your basic leadership style? Give specific examples.
- Do you feel you work more effectively on a one to one basis or in a group situation?
- Have you ever led a task force or committee or any group who doesn't report to you, but from whom you have to get work? How did you do it? How would you handle the job differently?

### ORAL PRESENTATION SKILLS

- Have you ever done any public or group speaking? Recently? Why? How did it go?
- Have you made any individual presentations recently? How did you prepare?

### WRITTEN COMMUNICATION SKILLS

- Would you rather write a report or give a verbal report? Why?
- What kind of writing have you done? For a group? For an individual?
- What is the extent of your participation in major reports that have to be written?

### FLEXIBILITY

- What was the most important idea or suggestion you received recently from your employees? What happened as a result?
- What do you think about the continuous changes in company operating policies & procedures?
- How effective has your company been in adapting its policies to fit a changing environment?
- What was the most significant change made in your company in the last six months which directly affected you, & how successfully do you think you implemented this change?

### STRESS TOLERANCE

- Do you feel pressure in your job? Tell me about it.
- What has been the highest pressure situation you have been under in recent years? How did you cope with it?

### STABILITY & MATURITY

- Describe your most significant success & failure in the last two years.
- What do you like to do best?
- What do you like to do least?
- What in your last review did your supervisor suggest needed improvement?
- What have you done about it?

### INTEREST IN SELF DEVELOPMENT

- What has been the most important person or event in your own self development?
- What kind of books & other publications do you read?
- Have you taken a management development course?
- How are you helping your subordinates develop themselves?





## **APPENDIX VI – Illegal Interview Questions**

### **AGE**

Inappropriate:

- How old are you?
- What year were you born?
- When did you graduate from high school?

Appropriate:

- Before hiring, asking if you are over the minimum age for the hours or working conditions.
- After hiring, verifying same with a birth certificate or other ID, and asking age on insurance forms.

### **CITIZENSHIP**

Inappropriate:

- Are you a citizen of the US?
- Are your parents or spouse citizens of the US?
- Are you, your parents or your spouse naturalized or native-born US citizens?

Appropriate:

- If you are not a US citizen, do you have the legal right to remain permanently in the US?
- What is your visa status (if no to the previous question).
- Are you able to provide proof of employment eligibility upon hire?

### **CRIMINAL RECORD**

Inappropriate:

- Have you ever been arrested?
- Have you ever spent a night in jail?

Appropriate:

- Have you ever been convicted of a crime?

### **DISABILITY**

Inappropriate:

- Do you have any disabilities?
- What's your medical history?
- How does your condition affect your abilities?

Appropriate:

- Can you perform the specific duties of the job.
- After hiring, ask about medical history on insurance forms.

### **SEX**

Inappropriate:

- Do you wish to be addressed as Mr., Mrs., Miss, or Ms.?
- What are your plans to have children in the future?

Appropriate:

- None



## APPENDIX VI – Illegal Interview Questions (cont'd)

### **FAMILY**

#### Inappropriate:

- Questions concerning spouse, or spouse's employment, salary, arrangements, or dependents.
- What kind of child care arrangements have you made?
- How will your spouse feel about the amount of time you will be traveling if you get this job?

#### Appropriate:

- Can you work overtime?
- Is there any reason you can't start at 7:30am?
- Whether an applicant can meet specified work schedules or has activities or commitments that may prevent him or her from meeting attendance requirements.

### **MARITAL STATUS**

#### Inappropriate:

- Are you married, divorced, separated, engaged, widowed, etc?
- Is this your maiden or married name?
- What is the name of your relative/spouse/children?
- Do you live with your parents?

#### Appropriate:

- After hiring, marital status on tax and insurance forms.

### **MILITARY**

#### Inappropriate:

- What type or condition is your military discharge?
- Can you supply your discharge papers?
- What is your experience in other than US armed forces?

#### Appropriate:

- Describe the relevant work experience that you acquired from a US armed forces.

### **PARENTAL STATUS**

#### Inappropriate:

- How many kids do you have?
- How old are your children?
- Are you pregnant?

#### Appropriate:

- After hiring, asking for dependent information on tax and insurance forms.

### **RESIDENCE**

#### Inappropriate:

- Do you own or rent your home?
- Do you live in town?
- With whom do you live?

#### Appropriate:

- Inquiries about the address to facilitate contact with the applicant.
- Will you be able to start work at 8:00am?



## APPENDIX VI – Illegal Interview Questions (cont'd)

### **RACE OR SKIN COLOR**

Inappropriate:

- What race are you?
- Are you a member of a minority group?

Appropriate:

- None

### **RELIGION OR CREED**

Inappropriate:

- What is your religious affiliation?
- Which religious holidays will you be taking off from work?
- Do you attend church regularly?

Appropriate:

- Can you work on Saturdays?

### **NATIONAL ORIGIN**

Inappropriate:

- What is your nationality?
- Where were you born?
- Where are your parents from?
- What's your heritage?
- How did you acquire the ability to speak, read or write a foreign language?
- What language is spoken in your home?

Appropriate:

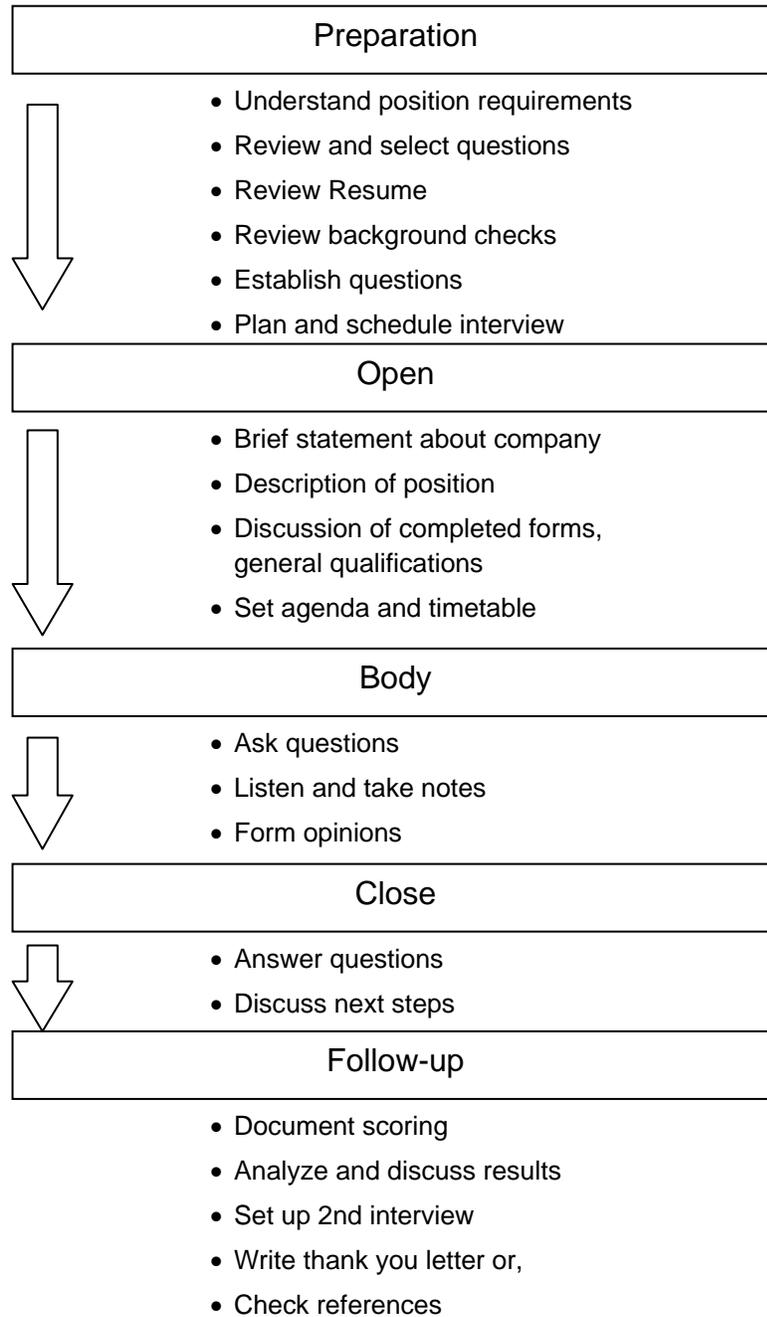
- Verifying legal U.S. residence or work visa status.
- What languages do you speak, read or write fluently?





**APPENDIX VII – Sample Interview Guide**

**TYPICAL INTERVIEW PROCESS**





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# INTERVIEWING GUIDE

September, 2001

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## Part One -- Performance Criteria and Associated Interview Questions

This guide is divided into three parts. The first is an overview of the performance criteria, the definitions/expectations of each of these, and possible interview questions that could prompt candidates to provide the information about themselves that can determine if they meet the criteria of the position.

The second part is an actual interview scorecard that can be used rate the candidate based on their responses to the questions.

The third part lists general interview questions that will help throughout the process.

<b>Performance Criteria</b>	<b>Expectations</b>	<b>Interview questions</b>
<b>Initiative and Resourcefulness</b>	<ul style="list-style-type: none"> <li>• Anticipates and welcomes positive, sensible change, and frequently develops improved processes, products or services to benefit the company and its customers</li> <li>• Demonstrates agility, adaptability and tolerance for ambiguity</li> <li>• Encourages entrepreneurial “out of the box” solutions</li> <li>• Anticipates customer needs, is proactive in raising issues and provides satisfactory solutions</li> </ul>	<ul style="list-style-type: none"> <li>• When you go home at night satisfied that you have accomplished something at work, what causes this sense of accomplishment? How often does this happen?</li> <li>• We all have areas that we want to work on. In your current job, what areas do you want to work on to improve yourself? How did you identify these areas? What are you doing about it?</li> <li>• What have been your major problems in the career field you have chosen? Why? What have you done to overcome them?</li> <li>• What company in our industry do you admire most and why? Which do you admire least and why?</li> </ul>
<b>Financial and Budgetary Control</b>	<ul style="list-style-type: none"> <li>• All budgets are met</li> <li>• Financial plans are clearly outlined and communicated</li> </ul>	<ul style="list-style-type: none"> <li>• Have you ever managed projects in which you had to budget and schedule work and/or material? Tell me about those projects. What went well; what didn't? What did you learn in those projects?</li> <li>• Do you control a personal budget for yourself? If so, what tools do you use?</li> <li>• What tools do you use to control your project budgets?</li> <li>• How do you determine predecessors in a schedule?</li> <li>• How do you know how much things cost?</li> <li>• What is your estimating process? Give me an example of a time when you had to adjust this process mid-stream.</li> </ul>

<b>Performance Criteria</b>	<b>Expectations</b>	<b>Interview questions</b>
<b>Communication Skills</b>	<ul style="list-style-type: none"> <li>• Employee has written and oral ability to clearly and convincingly express thoughts, ideas or facts in individual and group settings</li> <li>• Uses correct word choice and conversations are appropriate in length, content and direction</li> <li>• Written materials are clean, understandable and error free</li> <li>• Effectively communicates with superiors, peers and subordinates; communicates openly, forcefully and effectively projecting credibility and confidence</li> </ul>	<ul style="list-style-type: none"> <li>• Have you ever given presentations in which you made recommendations about a new product, service or procedure? Tell me about those presentations?</li> <li>• How would you define active listening? Please give me an example of how you would use it.</li> <li>• Describe some examples of written presentations you have made. Who were the recipients, how did you determine the content and layout?</li> <li>• Can you think of some projects or ideas (not necessarily your own) that were sold, implemented, or carried out successfully primarily because of your efforts?</li> </ul>
<b>Judgment</b>	<ul style="list-style-type: none"> <li>• Asks probing questions in a tactful, friendly manner to gather more information and get an appropriately detailed response</li> <li>• Obtains and evaluates information from all relevant sources</li> <li>• Uses information effectively to arrive at conclusions which are appropriate to the situation</li> <li>• Demonstrates integrity, sincerity and trustworthiness</li> <li>• Acts decisively, making sound decisions in a timely manner</li> </ul>	<ul style="list-style-type: none"> <li>• Give me an example of a time when you had a problem being both fair and consistent.</li> <li>• Describe a situation in which you had to arrive at a compromise or guide others to a compromise.</li> <li>• Tell me about your boss. What are his/her strengths and weaknesses?</li> <li>• Tell me about the worst boss you ever had.</li> <li>• Tell me about a time in which you "bent the ethical rules" at work.</li> <li>• Which comes first to you, work or family?</li> <li>• What makes you angry? Tell me about a time you became angry.</li> <li>• Tell me two anecdotes about yourself that will convey to me the real essence of who you are as a person.</li> <li>• What has been the most difficult decision you have ever made? By what process did you arrive at your decision? Would you make the same decision again?</li> <li>• Give me an example of a time that you misjudged a political situation.</li> </ul>

<b>Performance Criteria</b>	<b>Expectations</b>	<b>Interview questions</b>
<b>Analysis and Solution</b>	<ul style="list-style-type: none"> <li>• Takes ownership of a problem and empowers themselves to resolve it</li> <li>• Resolves conflicts with customers, peers and others as a win-win solution in a timely manner</li> <li>• Gains approval, buy-in, and/or commitment by presenting information or ideas in a persuasive manner</li> <li>• Communicates potential areas of conflict to management and project team in a timely manner</li> </ul>	<ul style="list-style-type: none"> <li>• Describe a few situations in which your work was criticized. Was it deserved? What did you do about it?</li> <li>• Tell me about a mistake you made in dealing with people.</li> <li>• How do you view yourself? How do others view you?</li> <li>• How would you describe your political skills?</li> <li>• Tell me about a time when you used your political skills to bring about an important event.</li> <li>• Give me an example of a time when you had to make an unpopular decision.</li> <li>• Has your schedule ever been upset by unforeseen circumstances? What did you do then? Give me a recent example? What did you do with the original plans you had for that day?</li> <li>• If you were starting over now, what would you do differently? What factors have kept you from making this decision before?</li> </ul>
<b>Planning and Organizing</b>	<ul style="list-style-type: none"> <li>• Systematically makes plans and sets objectives</li> <li>• Structures tasks effectively to achieve objectives</li> <li>• Sets appropriate priorities and meets schedules</li> <li>• Work station, calendar, appearance and presentation materials are clean and organized; runs effective meetings</li> <li>• Effective at developing project plans insuring timelines are established and outcomes are achieved</li> </ul>	<ul style="list-style-type: none"> <li>• Give me an example of a day when you had to handle multiple time bound tasks or projects.</li> <li>• Tell me about a challenging task or project you were involved with that had a tight deadline. What was your role? What were the results?</li> <li>• What are you doing to try to overcome some of your weaknesses?</li> <li>• Tell me about each time you made a major change in your career. Why did you change jobs? How did it work out?</li> <li>• Give me an example of a project you have managed. What phases did it go through. How long did it take? How many others were involved? Was it successful? What tools did you use?</li> <li>• Describe a typical day/ week. How do you prioritize/ manage your time?</li> <li>• Do you regularly use any special organizational tools?</li> </ul>

<b>Performance Criteria</b>	<b>Expectations</b>	<b>Interview questions</b>
<b>Willingness to Accept Responsibility</b>	<ul style="list-style-type: none"> <li>• Grasps opportunities and takes initiative to follow through rather than wait for problems to arise</li> <li>• Takes ownership of a problem and appropriately empowers themselves to resolve it</li> <li>• Seizes opportunities to lead and influence others</li> <li>• Takes ownership of issues, provides timely follow-up, lives up to commitments and agreed upon timelines</li> <li>• Takes charge in the absence of detailed instruction; has the quality of knowing what needs to be done; plans and organizes</li> </ul>	<ul style="list-style-type: none"> <li>• What changes have you tried to implement in your previous area of responsibility? What have you done to get them underway? Where did the ideas for the changes come from?</li> <li>• Describe your ideal organization.</li> <li>• What motivates you to put forth your greatest effort?</li> <li>• What outside interests do you have? How much time do you spend on them?</li> <li>• What do you feel are the greatest challenges facing our industry?</li> <li>• Give me an example of something you have done that has been creative or innovative.</li> <li>• Tell me about the biggest business risk you've ever taken.</li> <li>• How would you characterize your approach to business risk-taking?</li> </ul>
<b>Supervisory Skills</b>	<ul style="list-style-type: none"> <li>• Effectively selects, utilizes, and develops subordinates/team members</li> <li>• Provides leadership, counseling, coaching and effective performance measures for staff and/or team members</li> <li>• Demonstrates self-confidence, authority and enthusiasm; effectively uses power and influence; inspires the cooperation and confidence of others; displays an ability to motivate</li> </ul>	<ul style="list-style-type: none"> <li>• Tell me about a situation in which you hired the wrong person or vendor.</li> <li>• Describe a specific situation in the past where a vendor/employee/fellow team member did not meet your performance expectations. What was the situation? What did you do? What was the result? What would you do differently?</li> <li>• Tell me about a challenging business decision you have made. What factors did you consider? How long did it take? Who did you involve?</li> <li>• Did you ever fail at any job (or activity) you tried? Why did you fail?</li> <li>• What have you learned from your mistakes? Give some examples.</li> <li>• What is the biggest mistake you ever made?</li> </ul>

<b>Performance Criteria</b>	<b>Expectations</b>	<b>Interview questions</b>
<b>Relationships with Others</b>	<ul style="list-style-type: none"> <li>• Shows understanding, support, courtesy, tact and cooperation in interactions with co-workers, subordinates, team members, customers and visitors</li> <li>• Maintains effective relationships</li> <li>• Contributes to group performance, draws out the best from others and build morale even under high pressure situations</li> </ul>	<ul style="list-style-type: none"> <li>• How would you describe a trusting business relationship? Describe in detail an individual with which you had this type of relationship. How did you develop this relationship? How long did it take? Who prompted the relationship?</li> <li>• How do you handle conflicts? Tell me about a situation in which you handled a conflict with _____.</li> <li>• What are you passionate about?</li> <li>• Do you work better in a small or larger organization? Why? Please give me some examples.</li> <li>• Describe the kind of organization in which you are most comfortable?</li> </ul>
<b>Dependability</b>	<ul style="list-style-type: none"> <li>• Does what they say they will do; achieves objectives as agreed upon and communicates problems immediately</li> <li>• Considered a “go to” person by team members</li> <li>• Work is reliable, consistent and accurate</li> </ul>	<ul style="list-style-type: none"> <li>• One occasionally encounters resistance from clients/vendors/other team members. How have you gotten cooperation from an unwilling party in the recent past? What was the situation?</li> <li>• How do you measure or evaluate success?</li> <li>• What three accomplishments have given you the most satisfaction? Why?</li> <li>• What do you think it takes to be successful in a company like ours?</li> <li>• Describe a situation in which your results did not meet expectations.</li> <li>• What is the key to your professional success?</li> <li>• Give me an example of a time that you were unable to meet your commitment(s). How often does this happen? How did you resolve it?</li> </ul>

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## Part Two

### \* Definitions of Scoring Criteria -

**No evidence (0)** -- No evidence that employees possesses the minimum skill necessary for the position.

**Negative (-)** -- The employee describes previous and potential actions which indicate that he/she does not possess the minimum skill and experience for the position. He/she could not articulate the behaviors that would indicate understanding of the requirements of this position.

**Neutral (=)** -- The employee describes previous and potential actions which indicate that he/she possess some of the minimum skill and experience for the position but not all areas required for the position. He/she may exhibit the expected behaviors but requires coaching and direction.

**Positive (+)** -- The employee describes situations in which they demonstrate the behaviors listed; may on occasion require additional guidance and assistance in maximizing full potential results of the situation.

# Performance Criteria Sheet

Name of Candidate: \_\_\_\_\_

Date of Interview: \_\_\_\_\_

INTERVIEWER	SKILL	WEIGHT %	SCORE	COMMENTS/NOTES	TOTAL
	Initiative and Resourcefulness				
	Financial and Budgetary Control				
	Communication Skills				
	Judgment				
	Analysis and Solution				
	Planning and Organizing				
	Willingness to Accept Responsibility				
	Supervisory Skills				
	Relationships with Others				
	Dependability				
	Job Knowledge/skills				

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## Part Three

Below is a list of other interview questions that can be used as general questions in the interview process:

1. Tell me about yourself
2. What interests you most about this position? Least?
3. What have you disliked most about your past jobs?
4. What do you really want to do in life? What areas interest you?
5. What one person has had the greatest influence in your life? Why?
6. Tell me about your most and least admired person.
7. What are your greatest accomplishments? Your greatest failures?
8. What are your three greatest strengths? Your three greatest weaknesses?
9. What has been your experience with layoffs? How have you handled them?
10. Tell me about a situation in which you had to make difficult firing decision (of employee or vendor).



## APPENDIX VIII – Sample Reference Check Form

### TELEPHONE REFERENCE CHECK

**Candidate:**

**Reference Name:**

**Relationship:**

**Company:**

**Checked by:**

**Date:**

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1. In what context do you know each other professionally?
2. How long was this association?
3. How would you describe his/her position and responsibilities?
4. Was he/she successful in meeting or exceeding your expectations? Did he/she typically achieve assigned objectives?
5. What were his/her major achievements?
6. If you were able to state his/her strong points, what would they be?
7. Any weakness that affects his/her job performance?
8. What do you assess his/her long term potential to be?
9. How would you compare him/her with others in a similar position?
10. How would you characterize his/her management style?
11. Do you think he/she is qualified for the position that he/she is currently being considered for, as it was described to you?
12. If it were your job to review him/her, after his/her review what is the one thing you would have him/her work on?