CHANGE COLLECTIVE

GUIDE TO RECRUITMENT FOR HIRING MANAGERS

Institute of Fundraising

CONTENTS

CONTENTS *continued*

INTRODUCTION TO THE EDI RECRUITMENT GUIDE

We have become used to using the terms "equality", "diversity" and "inclusion" and most of us will believe we live and operate as people with an understanding of these terms and see them as core values, particularly working in the charity and not for profit sector. Individually we are doing our best but the sector, as a whole, lacks diversity in its trustee boards, senior management teams, services and in fundraising.

Changing systemic failure and practice takes time. The causes and systems are rooted in history, culture, norms and rules; if it was easy, we would have done it already. We operate in a broken system, falling back on what is easy to do rather than doing what is needed. We recruit for culture fit and ignore the value of culture add.

The Chartered Institute of Fundraising is the profession's membership body. Our Change Collective strategy identifies that 91% of fundraisers are white; 76% are women; 97% do not have a disability. We need to address this as a profession, together, where there is a leadership from trustees, chief executives, directors of fundraising and human resource professionals who embrace the importance of EDI for themselves and within their fundraising team. **Who Isn't In The Room?** shows 70% of you say you have an EDI policy in place. We want to you to turn policy into practice to ensure entry to the profession is diverse at all levels and for progression and retention within the profession to be based on merit with equal pay for equal work.

We are working with our members and charities across the UK to ensure fundraising is, and is acknowledged to be, an equal, diverse and inclusive profession.

We have produced this guide for our members to help you think about the actions you can take, decisions you make, to achieve a more diverse fundraising workforce. The majority of the guide was written before the Coronavirus (Covid-19) crisis and those principles, experience and guidance remain important. Additional elements have been added to reflect recruitment in a crisis. It is not comprehensive and cannot be used as a legal guide; rules and regulations change and it is your responsibility to check you are operating within the law.

You can skip through quickly by reading the Guide Points or you can delve deeper and read some of the expert advice and the lived experience of fundraisers.

"The Chartered Institute of Fundraising's vision is "Excellent Fundraising for a Better World", and through our **#ChangeCollective** work on Equality, Diversity and Inclusion we have been absolutely clear that for an organisation to deliver excellent fundraising it has to have equal, diverse and inclusive teams. That is because we know more equal, more diverse and more inclusive teams will deliver better fundraising.

The same goes for society as a whole. A more equal, diverse and inclusive society is better not just for those who are currently disadvantaged. It is better for all of us."

Peter Lewis, CEO, Chartered Institute of Fundraising

ACKNOWLEDGEMENTS

In developing this guide we have read many other recruitment and other toolkits: some generic, some specialist and some specifically aimed at improving equality, diversity and inclusion in the workplace.

Most suggest more or less the same things, and so have we. If it feels you have read something before take that as a merit badge for having done some (or much reading) on the subject. We have aimed to confine these elements to the Guide Points. Where we have differed from other toolkits is by curating a range of expert advice and first person lived experience contributions.

We have tried to provide the culture add, not just culture fit, in all that we offer. This has been possible through the generous contributions of organisations, partners and individuals. We thank them all and to those who have offered further contributions as part of the update of the guide.

Expert advice and lived experience text is credited at the start of their contribution but many others had a hand in shaping the guide. Thanks go to:

PARTICIPANTS ON FOUR ROUNDTABLES: Charity HR Network; recruitment agencies; member organisations and; the appeal directors group. Ryan Burdock at Prospectus is singled out for introducing the idea of "culture add" to the discussion.

CHARTERED INSTITUTE OF FUNDRAISING MEMBERS WHO COMPLETED THE SURVEY. Your contributions provided a definite steer on what good practice would look like.

OUR PARTNERS, **CharityJob** for offering up some of their blog content for inclusion. **Webrecruit**, the **Recruitment and Employment Confederation** and **Green Park** for writing content specifically commissioned for this guide.

SPECIAL THANKS TO THOSE INDIVIDUALS who shared difficult stories that hold a mirror up to the dissonance between what the policies say and the practice in individual organisations.

FINALLY, THANKS TO THE CHARTERED INSTITUTE OF FUNDRAISING EDI COMMITTEE for shaping this guide by asking the questions, suggesting what they want to see and holding us to get the work done; and to the staff team at the Chartered Institute who have given us ideas, provided leads to potential content and been involved in making sure something was produced on time.

SOCIAL CLASS INTERSECTIONALITY

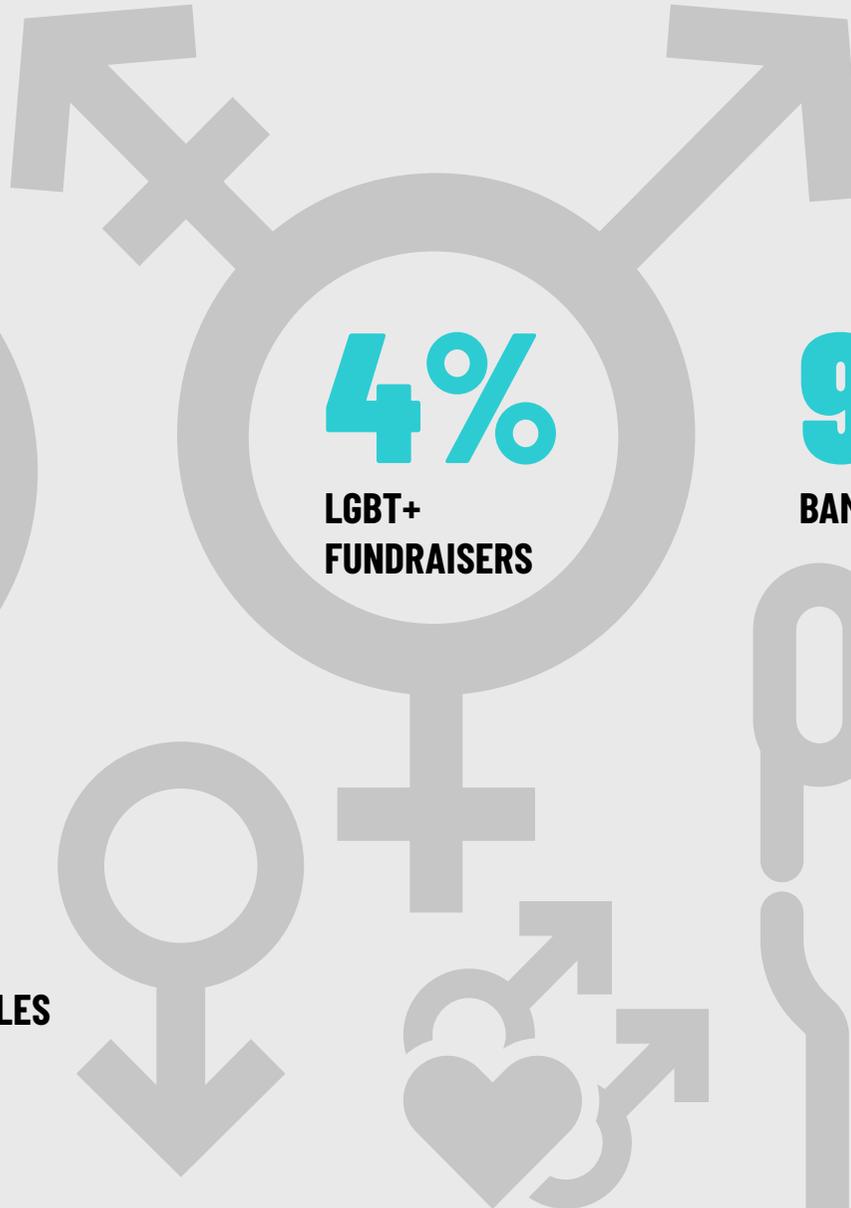**3%** DISABLED FUNDRAISERS

10% PAY GAP – WOMEN IN SENIOR ROLES

24% MEN IN FUNDRAISING ROLES

4% LGBT+ FUNDRAISERS

9% BAME FUNDRAISERS

WHAT IS EDI? SOME DEFINITIONS TO GET YOU STARTED

EQUALITY

Equality is used as shorthand for 'Equal Opportunities'. In the workplace and for recruitment we use this to describe our legal compliance with anti-discrimination legislation. This protects people from being discriminated against on the grounds of sex, race, disability, age, sexual orientation, gender reassignment, religion and belief, marriage and civil partnership, and pregnancy and maternity. These are known as protected characteristics in the Equality Act 2010.

DIVERSITY

Diversity is about a wide range of characteristics. It covers visible and invisible individual differences and refers to the makeup of groups and your staff teams. The makeup usually refers to the protected characteristics but also about the intersectionality in those characteristics along with education, socio-economic differences, family structures, culture, values, political beliefs, and the experiences people have that leads to different thoughts and ideas. In the workplace we might think about diversity in terms of the numbers of people with different characteristics we have at different levels of the organisation: diversity is something we can measure.

INCLUSION

Inclusion is about respecting and embracing the difference individuals bring and changing your systems, processes and behaviours to do more than meet legal obligations. It is more than representation. Inclusion enables people to have a sense of connection and belonging, to feel welcomed and valued. Inclusion challenges us to overcome our unconscious bias to achieve equity.

EQUITY

Equity is about the fair treatment needed to ensure everyone can access opportunities, advance and achieve the same or similar outcomes. Equity recognises the different starting positions, privileges or disadvantages of individuals and groups and creates the processes, actions and behaviours to address these. This might include using positive action to recruit a more diverse workforce.

EQUALITY
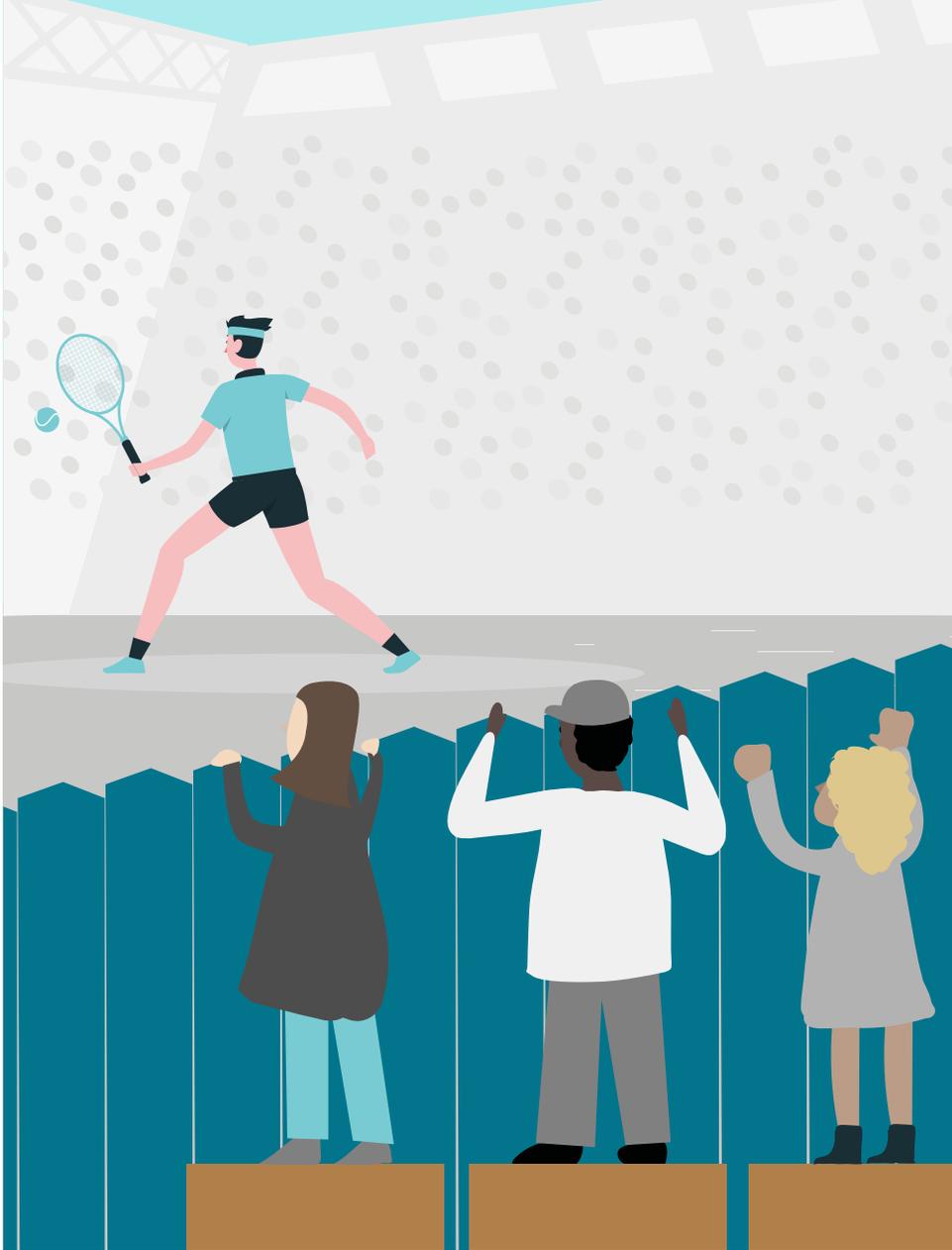
EQUITY
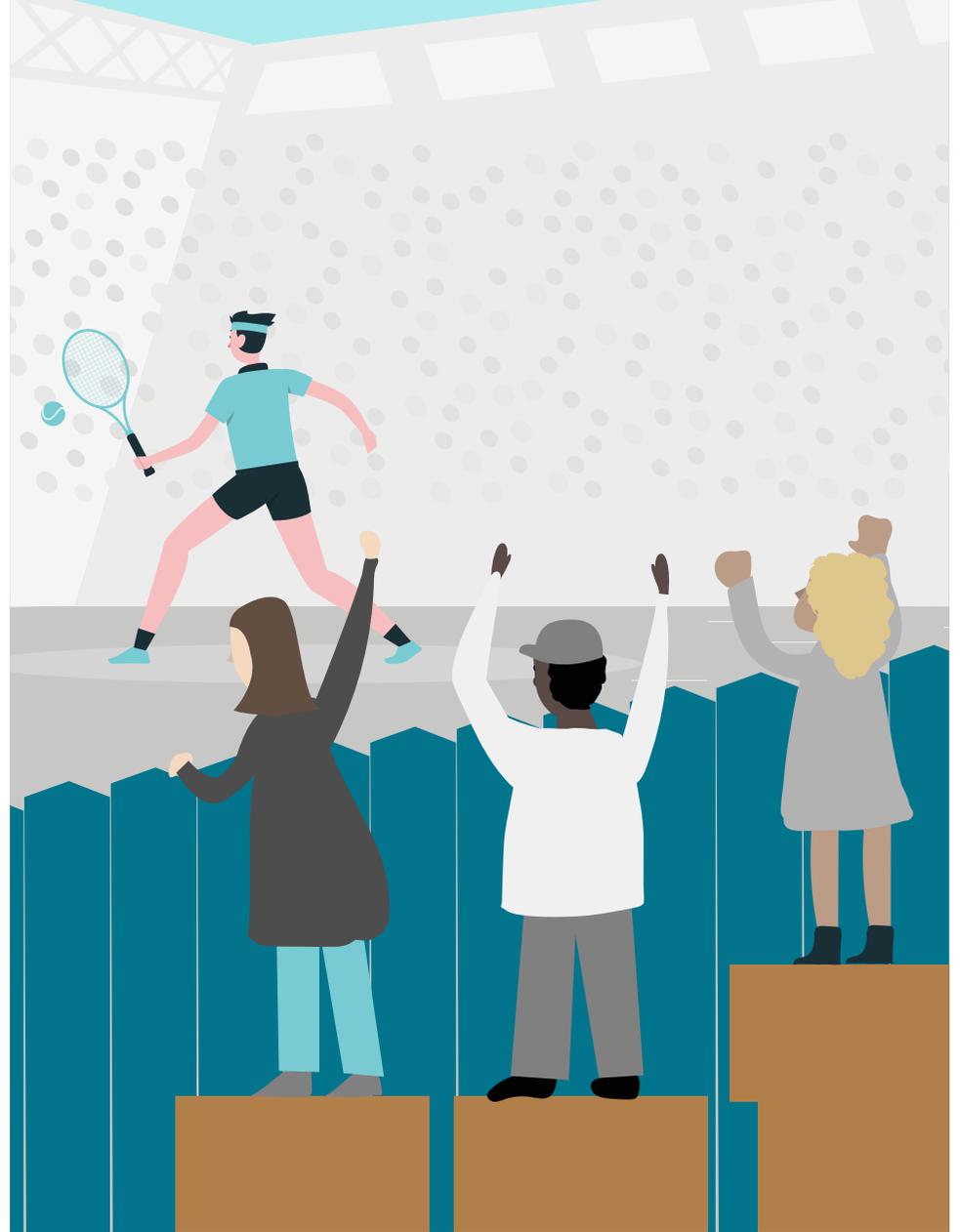
UNCONSCIOUS OR IMPLICIT BIAS

Bias is a prejudice against or in favour of something, some groups and people. We have conscious, explicit biases and we have unconscious, implicit biases. We all have unconscious beliefs and stereotypes arising from our environment, upbringing, values and experiences. Being aware of our biases helps us look at the systems and processes we create that may lead to recruiting less diverse teams.

INTERSECTIONALITY

Intersectionality refers to the complex and cumulative ways that multiple forms of discrimination overlap and combine to affect people and groups. Thinking about intersectionality arises from Kimberlé Crenshaw's theory that each category (e.g. race, gender, socio-economic background, education) does not exist in isolation and should be addressed together and at the intersection of those experiences.

EQUALITY AND DIVERSITY POLICY – WHERE TO START

EDI STATEMENT, POLICY AND PROCEDURES

Our research shows that 70% of respondents say that their organisation has an equality, diversity and inclusion policy, 60% have EDI as a stated value, priority or strategic objective and 35% require staff to attend EDI training. As the hiring manager, do you know whether you have a statement, a policy or both? Do you know your organisation's procedures for EDI in recruitment? If not, find out what you have, read the policies and procedures and review whether these are adequate.

Your statement, policy and procedures should set out that you will treat everyone fairly and that you are open and receptive to the needs of those with protected and unique characteristics and will be supportive and inclusive of them as candidates and employees.

Before you start, map out the organisation's power structure. Do you have a diverse group of decision makers with the vision to identify the changes needed to be diverse and inclusive, to seek out a diversity of talent and experience to fill vacancies, and to promote for difference? Diversity is about diversity of thought and experience as well as visible characteristics.

STATEMENT

Your statement might set out your intention and your values. You can find EDI statements on job advertisements but there are mixed views about this. Some people with protected characteristics welcome seeing a statement and others say it would put them off applying as it emphasises their difference.

GUIDE POINTS:

- **Review your EDI statement.**

- **You could carry out a short staff survey to see if the statement encouraged or discouraged them from applying.**

- **Consider what the statement says about your overall brand.**

Your EDI policy will explain your values towards equality and diversity in the workplace and the attitudes that form your culture. Your policy might set out:

- **Your aim to have a positive and supportive environment for all service users, stakeholders and employees**

- **Providing an equal and fair opportunity to everyone applying to work at your organisation, regardless of background or protected characteristics.**

- **Your commitment to protecting employees from being discriminated against because of one or more of the protected characteristics that apply to them.**

- **Promoting the diversity of the workforce and demonstrating an alignment with your cause.**

- **Commitment to keeping valued employees and attracting a diversity of applicants through flexible working, job-share or part-time working.**

GUIDE POINTS

1. Write a statement that outlines your organisation's commitment to equality, diversity and inclusion using positive and inclusive language.

2. Put your values at the top and centre of the policy.

3. Clearly set out that recruitment and employment will not discriminate on the grounds of any protected characteristics.

4. Set out if any roles have a Genuine Occupational Requirement that may deviate from applying non-discrimination of protected characteristics.

5. Explicitly state that you oppose all forms of unlawful and unfair discrimination.

6. Describe the work environment you want (or have) to be free from prejudice and discrimination, where people are treated with dignity and respect.

7. State that, when selecting for employment, promotion, training, or any special opportunity like attending a conference or high-level meetings, it will be based on the individual's own aptitude and ability.

8. State that disciplinary action will be taken against those that breach your policy.

9. Make it clear that the policy is active, regularly reviewed by senior managers and the board and accessible to anyone who wants it.

10. Put the statement and policy on your website.

CREATING A COMPANY CULTURE THAT ATTRACTS THE BEST TALENT

This is an edited version of content provided for the [CharityJob recruiter advice blog](#) by Kristen Bowier at Qwilr, an online platform for beautiful, intuitive sales and marketing documents.

The conversation around culture has been permeating in the corporate world for years now, with more and more businesses focusing on creating the right atmosphere to attract top talent. No matter the mission or size of your charity, it's crucial to clearly identify your core values, beliefs, and perspectives. If you haven't already, taking a deep dive into defining your organisational culture will help recruit the right talent to drive your mission to the next level.

WHY CHARITIES NEED A DEFINED CULTURE

There's a lot of misinformation about what working in the charity sector is really like. Especially when employees come from a corporate background. The culture of your organisation determines your team's understanding of how your charity approaches its mission and tasks. It gives them a roadmap for the best way to achieve their goals. This can also impact donor satisfaction and increase your team's engagement and commitment.

When both your employees and your donors understand your core values, they're empowered then to take action in the right direction. And it builds a culture of trust, which is the most important aspect of running a charity. Happy employees mean more success for your non-profit, which is why assessing your values is such a crucial part of making sure that everyone is on the same page.

NOT SURE WHERE TO START? ASK YOURSELF:

- **What atmosphere do we want to create in our office?**
- **How do we define working hours during a typical day?**
- **What would make our employees proud to work for our charity?**
- **Are we relying on effective processes?**
- **How do we celebrate success?**
- **What kind of flexible arrangements do we offer for our staff?**
- **How should we define the way we work and what does that mean for our mission?**

Working through each of these should give you a clear idea of your non-profit's current operations, allowing you to use this information to decide on the principles that are most valuable to you.

WANT TO DEFINE YOUR CULTURE? YOU NEED A CLEAR MISSION STATEMENT FIRST.

It's absolutely crucial that your staff understand what your charity stands for (and what it doesn't). An easy way to communicate this internally is through the mission statement. It's what gives candidates a chance to really understand what you are trying to achieve (and attracts more people to want to work for your charity).

Your mission statement needs to be a thoughtful and honest representation of the purpose your charity serves to its audience.

It's the 'who', 'what' and the 'why' of your company, defining the reason why it exists. But it doesn't have to be long – in fact, you can achieve a lot with just a few words. Let's take a look at a few mission statements from other non-profits:

- **TED: Spread ideas.**
- **Oxfam: Our vision is just a world without poverty.**
- **Watts of Love: Watts of Love is a global solar lighting non-profit bringing people the power to raise themselves out of the darkness of poverty.**

Simple, right? And by infusing your mission in your non-profit's day-to-day culture, you'll be encouraging your team to not only have a purpose but to have it with passion. It's been found that teams who have a higher connection with the charity's mission are more likely to be satisfied, involved with their work, and committed to the organisation for the long-term.

> *"It's been found that teams who have a higher connection with the charity's mission are more likely to be satisfied, involved with their work…"*

PROMOTING YOUR CULTURE FROM THE TOP DOWN

Every employee impacts the way a culture is built and defined, but leadership plays a big part in driving that culture in the right direction. Managers enforce the charity's ideals in their teams, making sure every employee is not only promoting the culture but actively enjoys being part of it.

Evaluate your leadership decisions and analyse how they impact the team. If you emphasise transparency as part of the organisation's credo, do you apply it to day-to-day communications? If flexibility is a big part of your values, are you actually flexible with the employees who report to you? You don't want to come across one way to your donors, but then not practice those values internally.

Explore these questions with leaders in your non-profit:

- **How transparent are you with your staff?**
- **How are you supporting professional development and career growth?**
- **Does your team know where the organisation stands and the direction it's going?**
- **Do you encourage an environment that welcomes honest feedback?**
- **Are you taking action on the feedback you receive?**

Organisational culture is an intentional act. It's defined by leadership, proactively practised and driven forward from the top down. Always clearly communicate principles and live your organisation's culture in your behaviour. Your team will follow suit.

"If you want to build a culture that's inspiring and drives dedication to your mission, it will take an active effort to push the ship in the desired direction."

CREATING A POSITIVE CULTURE FOR A HAPPY TEAM

It may come as no surprise that **when your staff feels empowered and cared about, it has a direct impact on their productivity**. Practising communicative processes on a regular basis is perhaps one of the most critical pieces of building a vibrant culture. Hold regular meetings to share and reflect on projects. Make brainstorms an open invitation. Celebrate successes. Learn from failures. The more you foster open communication and encourage creativity, the more successful your employees will be.

If you want to build a culture that's inspiring and drives dedication to your mission, it will take an active effort to push the ship in the desired direction. These actions will have a deep, lasting effect on your team, supporters, and the overall success of your organisation. Happier staff means happier donors and more success. It may take a bit of time to establish, but trust us, you'll be glad you did it.

EXPERT ADVICE

Lucy Caldicott, CEO of ChangeOut, former member of the EDI Panel and former Director of Fundraising, sets out why planning your recruitment is 'business as usual' and what to consider when scoping the role.

RECRUITMENT PLANNING

Recruiting for new team members shouldn't be seen as a task that emerges out of the blue. Given that fundraising teams are likely to experience the highest levels of staff turnover in comparison with other teams within charities, planning for recruitment should be about planning for business as usual, even if you can't plan for exactly where or when those vacancies are going to come.

A discussion with charity HR directors revealed it's not unusual for one in five fundraising roles to be vacant in a year, and for recruiting managers in fundraising teams to be the most likely to push to bend internal rules in order to fill these vacancies rapidly, even though they could have been predicted.

"Including inevitable vacancies in your planning assumptions upfront will help you avoid panicking to fill a post."

Including inevitable vacancies in your planning assumptions upfront will help you avoid panicking to fill a post because of an income gap because that

"Fundraisers can be the worst culprits for trying to bend the rules on salary, timing, use of consultants."

income gap has already been factored in. Fundraisers can be the worst culprits for trying to bend the rules on salary, timing, use of consultants etc. often citing "meeting targets" as the reason. See above for planning for recruitment in advance for how to avoid the need to panic-recruit.

If you're looking to diversify your workforce, planning in advance for recruitment of a wider range of candidates than you might normally attract becomes even more important in order to seek out different places to advertise, recruitment agency partnerships to work with, or allow for more time for candidates to come forward.

HERE ARE SOME TIPS AND THINGS TO CONSIDER:

1. Analyse turnover in your teams over the past few years to see where it is most likely to be. This will be a very revealing piece of work into staff satisfaction anyway.

2. Work closely with your human resources team, where you have one, on recruitment timetables and processes. See them as your business partner, there to support you, rather than something designed to get in your way.

3. Consider meeting your HR colleagues regularly to plan for likely recruitment needs. Maybe engage them when you're developing your strategies and plans. Too often teams plan in isolation from one another and then wonder why they end up in conflict.

4. Review where you've advertised for roles over the past couple of years, which agencies you've used, and how much you've spent. Are you getting good results? Are you attracting a diversity of applicants?

5. Engage your HR team in helping you research some new places to seek recruits e.g. local newspaper, local Job Centre, recruiters that specialise in diversity.

> *"Make sure you use the tools open to you to find out whether there are aspects of the department, role content, management processes that could be improved."*

SCOPING THE ROLE

Before you start scoping the role, there's another vitally important task to undertake that is too often ignored in the flurry to get the job ads out and the recruitment process underway. This is to get a good sense of why the person is leaving. Often this will be for purely positive reasons.

> *"Helping people to feel good about the time they've contributed to an organisation is very important."*

But even if it is, there may be underlying unhappiness that led them to be more likely to take the head-hunter's call, or open CharityJob's Saturday vacancy email.

Make sure you use the tools open to you to find out whether there are aspects of the department, role content, management processes that could be improved. Take time to read the write up of any exit interview that's been done. Over time, this will give you vital information about what's going on in the department. Are there any patterns emerging? Also make time to chat to the person yourself. Ask them if there's anything they'd like to tell you about why they're leaving. On the one hand, this will give you important intelligence to use for scoping the role, or developing your department, and on the other hand it will help the person leaving to feel valued as they move on. Helping people to feel good about the time they've contributed to an organisation is very important. Ideally, they will move on to their next role more likely to recommend you as an employer.

If a position becomes vacant, scoping the task of filling it should fit within the overall strategy. The first question shouldn't be, how do I get another one of those? It should be where should we be focusing our investment to move us closer to achieving our strategy? Of course, this means you have to have a long-term strategy!

It also requires a collaboration between your teams so that they all understand what the overall strategy is. For example, you've identified in your long-term plan that you have a real opportunity to grow your trusts and foundation income, but you need an extra team member to work on building these relationships.

You've not been able to achieve additional expenditure to hire a new team member. In your events team, you have some events that have been in decline. A vacancy has now arisen in the events team. The first question that you should ask is, should we replace this with another events person, or should we take a decision to delete that post, pause the failing events, and open up a new role in the trusts and foundations team? Of course, events (ideally) generate profit in year, and trusts are a longer term investment, but if you have a five year plan in place, it will be easier to make the business case to take the short term hit for the long term gain.

"Unfair pay disparities can see you in court at one extreme, or at the very least, make people feel under- valued and unhappy."

It's important to consider the external and internal worlds when putting the role description together. If the person had been in post some time, the role may have evolved with them, so it is important to think this through - ideally in discussion with them before they go. Again, to plan for this in advance, it is recommended to make sure job descriptions are being reviewed and kept up-to-date on an annual basis as part of the appraisal process. Your human resources team should be able to help you with external benchmarking information for setting pay and job title.

They will have access to intelligence from other charities. As you're planning for the recruitment, think through the impact internally of level and pay of this new role, make sure it's in line with other comparable roles. Unfair pay disparities can see you in court at one extreme, or at the very least, make people feel under-valued and unhappy.

"Different perspectives and ideas are vital to keep the fundraising profession moving forward so really think about where there are parallels in other industries."

When you're writing the role description, in order to attract the widest field of candidates, think through how to open up the skills, knowledge and competencies required for the role to ensure people from different backgrounds would think that they have them.

Different perspectives and ideas are vital to keep the fundraising profession moving forward so really think about where there are parallels in other industries. Companies that are renowned for customer service excellence, for example, or companies that are seen as entrepreneurial.

OTHER ASPECTS TO CONSIDER:

- Think about what's lacking in your team and try to identify where you might find it.

- Make sure you keep the language you use jargon-free, and neutral, avoiding unnecessarily gendered language which can uphold stereotypes. Total Jobs has a useful gender bias decoder at **totaljobs.com/insidejob/gender-bias-decoder/#methodology** which will point out if the language is overly skewed.

- In order to attract the widest possible field of candidates, you will also need to consider how flexible the role can be. Does it really have to be full-time, five days a week, in a certain location?

- Could a job share or remote working be feasible?

- If you're open to candidates putting themselves forward in the knowledge that you're open to promotions about flexible working, say so. Many candidates will not put themselves forward if they think that they'll have to negotiate for one day a week at home as even if this seems a very reasonable request, they may think this will be held against them.

- Is this a permanent appointment or would a temporary or fixed term appointee be a good idea? The answer to this will come from your strategy. Maybe you can be open to either depending on who applies. Again, this will give you a broader range of potential candidates as more people are actively choosing to work on interim contracts rather than wanting the commitment of something static and long-term.

- When writing the job description and person spec, clearly you need to outline the role content and the skills, knowledge, and competencies required. Also bring it to life by painting a picture of the kind of activities the role will undertake and what it's like to work in your team so that you are and really selling the helping someone see that it could be the role for them.

- Have a really good think about what are the essential and desirable criteria. Attention to detail in an events role or competence at project management in a direct marketing role are essential. Listing something like a BA (Hons) degree, as essential, or even desirable, really needs scrutiny.

ENTRY LEVEL ROLES

One of the ways you can increase the diversity pipeline is to grow your talent with an active approach to diversity. Our Director of Individual Membership, Compliance and Professional Development, Alex Xavier, sets out the routes into the profession. This mirrors the guidance developed for candidates.

INTERNSHIPS

Many charities in the sector offer paid internships for those who want to gain experience of working in fundraising. Internships are usually short term and provide experience of what it's like to work in a professional environment. You may start the intern on a range of administrative tasks such as minute taking, data entry, handling supplier invoices and responding to emails before moving onto opportunities to develop skills in specialist areas such as supporter stewardship and digital.

Interns have rights and should never been seen as free or cheap ways to fill gaps in your team. Unpaid internships (and full, or near full time volunteering) are not financially accessible options for most people.

GUIDE POINTS

1. Review your policy and procedures for interns to include payment at the national minimum wage, at least, or the living wage.

2. Make sure you have a plan for recruiting and supporting an intern or group of interns; provide them with a manager and regular supervision.

3. Consider internships designed for returners to the workforce, disabled people and people from lower socio-economic backgrounds.

4. Provide interns with skills development opportunities beyond basic administration

5. Be sure to familiarise yourself with the government's guidance on internships:
   gov.uk/employment-rights-for-interns

6. Be clear about progression opportunities, how to access them and feedback if they are unsuccessful in getting a permanent job.

7. Get feedback from current interns and those moving on before recruiting new interns.

8. Agree a reference with them.

APPRENTICESHIPS

Apprenticeships allow someone to undertake paid employment and professional training at the same time. In undertaking an apprenticeship, the apprentice will work very closely with you as the employer and an approved training provider to gain knowledge, develop skills and hone behavioural traits over the duration of the apprenticeship.

When you and the training provider deem the apprentice ready, you will put them forward for an end-point assessment (EPA) where they are tested against the learning outcomes of the apprenticeship. You can find out more information about apprenticeships on the Institute for Apprenticeships website at the following: **instituteforapprenticeships.org/apprentices**

It is anticipated that a Level 3 (A-Level equivalent) 'Fundraiser' apprenticeship will be offered by charities in 2020. You can keep up to date with the development of this standard by checking the Institute for Apprenticeships website.

GUIDE POINTS

1. Make sure you fully understand how apprenticeship programmes work

2. Discuss what the apprentice wants to get out of your apprenticeship programme

3. Make sure you offer a balance between work and 'off the job' training

MOVING FROM FACE TO FACE (F2F) TO OFFICE-BASED FUNDRAISING

Face to face fundraisers may want to develop their fundraising careers by moving into office-based roles. They are likely to have gained knowledge of the fundraising environment including its regulation and skills such as relationship building, storytelling and emotional intelligence and honed behavioural traits such as being resilient and showing empathy. All these areas of knowledge, skills and behaviours are transferable into other areas of fundraising including but not limited to events, community, corporate partnerships and major donor fundraising.

GUIDE POINTS

1. Recognise and respect the skills and experience gained

2. Ask for examples of how their skills and knowledge are transferable

3. Identify development needs and plan for these

TEMP TO PERM TRANSITION

It is rare for hiring managers to take temporary workers into permanent roles, usually because recruitment policies require roles to be externally advertised and because of the additional agency placement fee. It may be a false economy to have a blanket policy that temps cannot transition to permanent roles.

Temping is a positive choice for some and those workers are unlikely to want to transition to a permanent role but for some temping is a stop-gap while they look for a permanent role.

GUIDE POINTS

1. Review your use of temps: what roles are they covering? What fee structure have you agreed with agencies? Are there temps you wanted to keep but your policy did not support this?

2. Let temps know when you are recruiting to permanent posts and include their applications when you shortlist.

3. If you appoint a current or former temp to the permanent role treat them as a new employee with the same induction programme and probationary period reviews.

4. Let the agency know and negotiate the placement fee.

Martha Awojobi, former Corporate Partnerships Senior Executive at Refuge and Organiser at #CharitySoWhite writes about her entry to and progression in fundraising as black and queer.

I fell into fundraising when I was 18. I was stopped by a street fundraiser called Sam on Wood Green High Road the summer holiday after I had finished my A Levels. I was too young to sign up, and I didn't have any money. He told me that he could refer me to the agency that he worked at and if I was successful, I could have a job for the summer. I was; we ended up working on the same team.

Over the next two years I worked campaigns for the **British Red Cross**, **Amnesty International**, **Break Through Breast Cancer**, **Cancer Research**, **World Vision** and many more. Street fundraising was by far the most challenging and rewarding job I have ever had. Not only are you asking busy strangers in London to drop what they are doing, listen to you and give you their bank details in the street, you are also battling the elements: rain, snow, winds, heatwaves. All with a smile on your face and a spring in your step. I will always have so much admiration for street fundraisers – it takes skill, bravery, resilience and grit to do that job.

In those years I was learning how to tell stories, build rapport, problem solve and think on my feet in order to make the ask and walk away successful. I was also talking all day about the truly amazing and innovative work that the charities I was representing were doing. I felt passionately about these causes and the people I encountered in the streets felt inspired by me. Enough to become regular donors. I fell in love with the third sector; I fell in love with fundraising.

"More people of colour should become fundraisers; the fundraising industry would be more innovative and authentic if there was a diverse range of people sitting at tables where decisions are made."

Fast forward a few more years and I am now a fundraising consultant after being the Corporate Partnerships Senior Executive at Refuge where I worked in the head office. I am also black and queer. This has its benefits, and its drawbacks. In the most meetings I am the only person of colour in the room. I feel a lot of pressure to be successful because I sometimes feel like I am representing my race. That pressure can be exhausting.

I work with some really cool businesses across the country whose values align with my organisation and

I have a lot of fun doing it. I think donors like working with me because I am different to who they usually see representing a charity. I bring a new perspective; I can connect with new audiences. It's refreshing. Donors want connection, and organisations are missing out on a whole pool of potential new donors from communities of colour, who want to give, because they don't have fundraisers in their teams who can connect with them.

"The work that the #ChangeCollective is doing to reinvent the fundraiser sector and nurture staff of colour and attract a more diverse range of talent is hugely valuable in our sector."

More people of colour should become fundraisers; the fundraising industry would be more innovative and authentic if there was a diverse range of people sitting at tables where decisions are made. Leaders have their part to play and should be investing time and budget into transforming their recruitment processes, and taking the time to understand BAME candidates and the barriers that we face, where we job search, which recruiters will find us and what language can inspire us to apply.

The work that the **#ChangeCollective** is doing to reinvent the fundraiser sector and nurture staff of colour and attract a more diverse range of talent is hugely valuable in our sector. I urge everyone to read their manifesto for change, learn about the barriers that people like me face and do your part to create truly inclusive environments that give everyone a fair chance at success.

I have always loved being a fundraiser, we inspire people to invest in social change and be part of a collective solutions to some of the most complex social issues of our time. We shouldn't be afraid to speak about our past failures when it comes to equality, diversity and inclusion. In fact, we should be the ones showing other sectors truly inclusivity looks like. All it takes is honesty, humility and hope.

Twitter: @Martha Awojobi

LOOKING BEYOND TECHNICAL SKILLS AND EXPERIENCE TOWARDS A DIVERSE AND VALUE-BASED WORKFORCE

The 'Get Hired' programme from Prince's Trust places an emphasis on hiring for potential and values – Rebecca Buchanan sets out her approach.

Recruitment isn't easy, for the employers or employees. It's a complex landscape of reading or writing numerous CVs and cover letters sprouting various educational achievements and employment highlights. However, in an ever-changing world, these skills we now covet are unlikely to be important in ten years' time. So, how do we choose the right person amongst a sea of potentially viable people?

We bring it back to values. Every person, young or old, has values that shape their behaviour. Values that can make them worth investing in.

Value-based hiring is about looking beyond the technical skills and experience listed in someone's CV.

Prince's Trust Get Hired have encouraged value-based recruitment by delivering 'Get Hired Live' events. Personal values and behaviours of young people are aligned with the workplace values of the hiring company, something that is not possible through a purely CV-based or competency-based approach.

Whilst we endeavour not to undermine technical or 'hard' skills, there should be an emphasis on the fact these can be learnt and will vary with importance over time. Additionally, by shifting the focus away from CVs, experience and academic credentials, you can significantly improve the diversity of your organisation.

"There are numerous reasons why diversity delivers such big returns but two of the biggest reasons are innovation and customer insight."

Put simply, diversity – whether gender, ethnicity or culture – is great for business.

Endless statistics, some of which can be found in Prince's Trust Get Hired latest whitepaper, show that ensuring your company is diverse creates a winning formula.

There are numerous reasons why diversity delivers such big returns but two of the biggest reasons are innovation and customer insight. Mixing a range of perspectives and life-experiences are the vital ingredients for driving innovation, eliciting new ideas and fostering creativity. All important for fundraising and connection to donors.

Additionally, customers are very unlikely to be one homogenous group. Creating a workforce that is

representative of your customer base makes for a more relatable organisation.

So, how do you go about creating a diverse, value-based organisation? Firstly, assess your current values. Let them evolve and be clear with any potential hires that you will hold these values high above all else.

Workplace diversity has become a must-have for any organisation looking to grow and compete. However, simply having a diverse workforce isn't enough; it needs to be accompanied by an environment where all employees – regardless of gender, age or ethnicity – feel they can share ideas and are empowered to take them forward. Make sure everyone at your organisation fully understands the benefits and commits to championing a diverse workplace.

It is only when diversity is combined with strong values and corporate culture that the benefits can be fully realised.

"Make sure everyone at your organisation fully understands the benefits and commits to championing a diverse workplace."

PLANNING THE RECRUITMENT TIMETABLE

It's easy to rush into a recruitment and build the timetable as you go along. Making time for recruitment and building a thoughtful time will ensure that inclusivity won't be compromised. It will also ensure that everyone you need to involve is clear about their role and responsibilities throughout the process.

GUIDE POINTS

1. Work backwards from your ideal start date.

2. Find a balance from the date of advert to interview that is not too long and not too short. Good candidates will be in demand and may be applying for several roles; leaving it too long can mean they accept other roles before your interview date. Too short and not enough candidates may see the role.

3. Check the religious holidays and bank holiday calendars. It is also worth checking the dates for major music festivals as your interview date may not be enough to give up a Glastonbury ticket.

4. Check with colleagues for comms and other significant events in the organisation. Extra traffic to the website or calls to reception may be handled better at quieter times.

5. Fix the dates for: JD ready; panel selection; advertising; closing date; shortlisting; interview dates; tests; and decisions. Communicate the key dates from closing to decision with candidates in the recruitment pack. This is all part of setting out your brand and inclusive values.

6. Checking with HR for other recruitments happening at or around the same time. It is not unknown for roles with similar job titles but in different departments to get confused.

7. Book accessible rooms for tests and interviews and book any equipment you might need.

8. Consider whether you offer tours of the office for potential applicants and build this in to the timetable.

CREATING YOUR RECRUITMENT PANEL

Your recruitment panel will be the voice and face of the organisation for candidates. Candidates will remember how they felt they were treated throughout the recruitment process, which can set the tone for relationship that follows and for how unsuccessful candidates talk about your organisation.

GUIDE POINTS

1. Selecting panel members to present diversity is not always easy. Panels should have a balance of experience and direct relevance to the recruitment. Panels are one way of offering development opportunities to colleagues.

2. The panel should always be chaired by the line manager.

3. What do your policies and procedures say about who can be on the panel and its remit? Are staff representatives at the same level allowed to be on a panel or must participants always be at least one grade higher? Do you need to include a director, HR, a trustee or even an external stakeholder on the panel? Do all panel participants have to complete mandatory training before they can be on a panel?

4. Ideally, panels are no more than 3 people to avoid candidates feeling overwhelmed and should have a minimum of two people. You might want to split the process so that one person carries out initial interviews (e.g. by phone, Skype or Facetime) before the panel meets with candidates. You may have a good reason to increase the panel size. Whatever you decide, let candidates know what to expect.

5. Decide what input the panel members have. Are members involved in developing the questions and tests or is the input limited to shortlisting and which questions they ask?

6. Does the panel have the power to make the final hiring decision or are they making a recommendation to a more senior level? How will this be communicated to that person and to the candidate? Will the candidate have to go through an additional stage with the final decision-maker?

7. It is sometimes useful to include an observer from HR or another function to observe the panel at work, including the interviews, to ensure all candidates are treated fairly and to identify how the organisation can improve its processes.

8. Build in time for the panel to receive EDI guidance and a conversation before the shortlisting.

9. The panel members should take time to debrief, think about how the process could be improved and feed this back to HR and/or senior managers.

ADVERTISING THE ROLE

The type of advert you create will depend on its purpose and audience. If you are advertising internally your focus will be on the role and department rather than selling the organisation and the benefits of working there. Whether it is an internal or external advert it should convey:

- What the role is

- How much it pays

- Hours, and whether flexible working is available

- Whether you are Disability Confident (two ticks)

- Where it is based

- Benefits

- The essential requirements of the job

- The type of person you want for the role

- Where it fits in the organisation

- Your values

Your recruitment ad may be the first time that a potential candidate finds out about your organisation. It is your shop window, your chance to set out your brand and bring people to your cause. It can be cheaper to place your print or online ad as unbranded but you may get more views with your name and logo. If you were looking for this job, what would you want to know? To reach a diverse pool of candidates your advertising strategy will need to do things differently.

GUIDE POINTS

- **Images:** are they inclusive and representative of your work?

- **Words and language:** are you using gendered language, jargon that might exclude people or phrases that could discriminate against some candidates?

- **Gaps:** can you use gendered language to attract more men to the role? Can you use language that specifically attracts disabled people? Language shouldn't be exclusionary but can be used to target people who are underrepresented in the profession and in your organisation.

- **Where:** are you advertising locally, regionally or nationally? In print media only? On your website alone? Through networks? Using tech-based job boards? Mitigate bias by using job sites that are more targeted to the candidates you are seeking to recruit. Use BAME specific job search pages and hosting or attending events and discussion forums to create an opportunity to network and attract diverse candidates.

- **Racial and ethnic diversity:** is this based on local demographics? A post in London should aim to reach the levels of diversity of London but aiming for the same in Cheshire may be unrealistic. Ensure your company branding is inclusive of BAME workforce but in a genuine and ethical manner.

- **Accessibility:** To attract and retain a diverse workforce, it is essential that your website is user friendly and all documents are available in accessible formats. Screen readers can struggle with tables, people with dyslexia might find some fonts and colours difficult to process. Are you able to provide audio alternatives?

- **Cost:** shop around for competitive prices for your adverts. If you are placing a lot of ads you might be able to negotiate preferential rate. Chartered Institute of Fundraising members get a membership discount at **CharityJob**.

- **Strategy:** if you consistently fail to attract BAME candidates, disabled candidates or men as candidates to your roles it may be there is a lack of visibility and clarity about why your opportunities are right for them. A single advert cannot address that. You will have to develop a medium term strategy to move your organisation, and the roles available, closer to reaching those candidates.

THE DOS AND DON'TS OF EQUALITY, DIVERSITY AND INCLUSION WITHIN YOUR JOB ADVERTS

Holly Watson, Marketing Manager, Webrecruit provides her 5 tips for advertising your role with EDI in mind.

Never underestimate the importance of your job adverts. Unless you have a well-known brand, your job adverts will likely be the first time jobseekers are made aware of your organisation so making a positive impression is vital.

Think of your job advert as your shop window; it should sell the job you're hiring for and should provide a clear overview of what life Is like within your organisation. If you're paying close attention to your EDI efforts within your recruitment process, your job advert is the ideal place to begin.

To help you along your way, we've pulled together five key tips to ensure that your job advert is a true reflection of your internal EDI efforts:

DO PAY CLOSE ATTENTION TO YOUR ESSENTIAL CRITERIA

When documenting your essential requirements for your job, avoid asking for a dream wish list of criteria; this is likely to deter the majority of your potential applicants. In fact, woman often won't apply for roles unless they meet 100% of the essential criteria, whereas men apply when they meet 60% of the essential criteria, according to research conducted by Hewlett Packard.

After you've drafted your job advert, look closely at the essential requirements and ask yourself if there's anything listed that candidates could easily learn on the job or if you're asking for skills that are too specific. For example, when hiring for a fundraising position, is previous fundraising experience really necessary or could you also consider transferable skills from sales, marketing or administration roles?

DON'T FALL VICTIM TO USING GENDER-BASED LANGUAGE

Certain words or phrases frequently used within job adverts can be classed as gender specific. For instance, words such as 'dynamic' or 'aggressive' have strong male connotations. On the other hand, words such as 'empathetic' and 'compassionate' are female gendered. You should take care to ensure that your advert is well balanced and isn't too geared towards a specific gender; choose your words wisely.

DO USE WELCOMING TEXT AT ANY GIVEN OPPORTUNITY

Your job advert should always aim to include and never exclude. Don't use terms such as 'previous applicants need not apply' or 'we're not looking for'. You should

encourage people to apply, rather than discouraging people from applying.

Many organisations opt to include equality statements within their adverts, which is positive, but they can sometimes feel impersonal and like they've been inserted to simply fulfil a legal requirement. Focus on making your language truly inclusive; ask applicants to make you aware of any special accessibility requirements for the interview process within your job advert and make sure that the next steps to apply are clearly signposted to avoid any confusion.

If your organisation has its own careers site where your vacancy is displayed, explore how you can make the site accessible for everyone, including those with visual and hearing loss and physical and cognitive disabilities.

"Focus on making your language truly inclusive; ask applicants to make you aware of any special accessibility requirements for the interview process within your job advert and make sure that the next steps to apply are clearly signposted to avoid any confusion."

DON'T FORGET ABOUT YOUR JOB TITLE

Job titles are important when advertising online; not only do they summarise what the role actually is but using the right job title makes it easier for relevant candidates to find your vacancy.

Explore more commonly used job titles for your role. For example, we've found increasingly that fundraising roles are being referred to as 'business development' in their job title and, as a result, are attracting more applicants as adverts are appearing in the search results of sales candidates seeking roles in the private sector. As sales is typically a male-dominated industry and fundraising is a female-dominated industry, this could help to rectify the gender imbalance.

DO CAREFULLY CONSIDER THE ADVERTISING PLATFORMS YOU'RE USING

If budget allows, it's worth adding some diversity job boards into your advertising mix (Diversifying, for example). It's a great opportunity to tap into under-represented talent pools and show that your organisation is serious about diversity and inclusion.

Advertising on social media platforms, such as Facebook, LinkedIn and Instagram, is also a good way of broadening your reach within the passive jobseeker market. Your dream candidate might not be actively looking for jobs on job boards, however they might be active users of social media. Putting together targeted social media campaigns that emote your organisation's mission is a good way of reaching talent you might not have reached before.

This is just the tip of the iceberg when it comes to enhancing your EDI efforts within your recruitment campaign but hopefully it gets you off to a good start! It's important to create the most positive first impression of your organisation as possible and your job advert is the ideal place to do this.

HOW TO WRITE A JOB AD THAT CANDIDATES (AND GOOGLE) LOVE

This is an edited version of a blog written by Stephanie Dotto, SEO and Content Lead at CharityJob, for the CharityJob recruiter advice blog.

Anyone who's worked in a charity will tell you it's a one-of-a-kind experience, an industry driven by passion and creative thinking. From the budding organisations operating out of home offices to the large multinational brands, what drives the sector is the remarkable and talented people working tirelessly to make a difference in the world.

But if you're a charity looking to recruit, how do you go about finding those people—the sort of can't-live-without employees that push your organisation in the right direction. Sure, you can attract candidates with the experience you're after, but how do you target the right people that also fit with your culture and your ethos?

UNDERSTANDING MODERN JOBSEEKER BEHAVIOUR

These days, writing a job ad that appeals to a search engine is just as important as one that appeals to a person. Let's face it, people are searching for everything on Google, and with the addition of Google for Jobs launching in the UK in 2018, it's become even easier for candidates to find a job without clicking through to a website. The trick is figuring out how to find that perfect balance of brand personality and job-specific keywords that pushes you up to the top of the search engine results.

"The trick is figuring out how to find that perfect balance of brand personality and job-specific keywords that pushes you up to the top of the search engine results."

In other words, you need to optimise your job postings.

The good news is that if you're posting on a job board like **CharityJob**, most of that optimisation is done for you. We take care of the technical stuff like schema markups that give Google all the info it needs to match candidates to job ads. But when it comes to the user-facing side of things, it's up to you to not only sell the benefits of the job to the candidate but to highlight why they want to work for your organisation.

Not sure where to begin? Let's take a closer look at what you can be doing more to optimise your job ad for the modern job seeker.

FIRST, WHAT EXACTLY IS GOOGLE FOR JOBS?

We're all familiar with the little shortcuts Google's been building over the years to make searching for the things we want easier. Think about the last time you googled flight prices to get a comparison—did you end up on Google Flights? Or maybe you were looking to buy some new shoes, and you clicked through to Google Shopping to compare what was on offer at the different high street retailers.

Much like that, Google for Jobs scrapes all the job boards and careers pages on the internet and pulls through relevant listings that match the types of jobs its users are searching for. And they don't even have to leave the Google search page to see the jobs that they're after. So, if someone types in 'fundraising jobs near me', Google pulls through all the relevant fundraising roles within an easy commute for the user.

WHAT DOES THIS MEAN FOR SECTOR-SPECIFIC JOB BOARDS?

When it was first announced that Google for Jobs would be launching in the UK back in July 2018, there was an impending sense of panic. No one knew what that would mean for their postings—would they be losing to traffic to Google? Would people stop going to job boards because it was just too many clicks to get what they were after?

But what actually happened was that Google for Jobs made it easier for users to find sites like **CharityJob** because it was all based on keywords. People who want to work in the charity sector were able to find the jobs that matched the preferences they were putting into the search box. In other words, it's given jobs in the charity sector

more visibility. Since its launch in 2018 job views from Google for Jobs have increased by 560%. That means more people are finding the jobs that matter most to them. And in return, charities are reaching a wider audience of people than ever before.

HOW CAN YOU CREATE A JOB AD THAT GOOGLE LOVES?

Optimising your job ad for Google and tailoring it to your candidates are essentially the same thing. Ultimately, all Google cares about is matching the right content to the queries its users are searching. So, if you put in all the information you think a candidate would want to know about your job, then you're already making it Google-friendly.

Put yourself in the candidate's shoes. What would you want to know about a job you're thinking about applying for? And what might intrigue you to learn more about the organisation and click 'apply'?

HERE ARE A FEW THINGS YOU SHOULD ALWAYS INCLUDE IN YOUR JOB ADS:

- **Location –** Candidates like to calculate things like commute times and costs, and this helps Google answer 'jobs near me' queries.

- **Base salary –** We know sometimes this can be a tricky one, especially for charities. But salary is important to candidates, especially if they're looking to advance in their career or want to know how much they could make shifting into the sector. You don't always have to make it visible on the front end, but a salary range needs to be included when you post the job (or else Google won't show it).

- **Job title –** If you have a unique job title (which many charities often do), organisations like **CharityJob** will match it to a standardised job title which is then shared with Google. That means users will still find your role, even if they aren't searching for those exact terms.

OTHER THINGS THAT CANDIDATES WANT TO KNOW ABOUT:

- **Employment type –** Full time? Part time? Contract? Make it clear right away.

- **Required skills –** The more skills you include, the faster a candidate will know if they're the right match for you.

- **Job benefits –** What do you offer that other charities might not?

- **Core values and company ethos –** This gives candidates a better idea of what your charity cares about and what sort of working environment to expect.

- **Equal opportunity statement –** Show that you're open to hiring every type of person.

WHEN IS THE BEST TIME TO ADVERTISE A JOB?

Holly Watson, Marketing Communications Executive at Webrecruit looks at their extensive data to identify the best time to advertise your role.

"August and December are the months with the highest average number of applications per role being advertised."

KEY TAKEAWAYS

- Job adverts tend to receive more applications at the beginning of the week (Monday and Tuesday) and fewer applications at the weekend

- Likewise, January and February are the busiest months in terms of roles being advertised and applications received

- August and December are the months with the highest average number of applications per role being advertised (advertising in these months could be a good chance to beat the competition!)

- April and May are slightly quieter months for recruitment in terms of the number of applications received per role so if you need to recruit heavily during these months, it might be worth putting some extra resource into candidate sourcing and specialist advertising platforms

We live in a truly digital age with thousands of new job adverts going live online every day. However, in such a competitive market for talent, when is the best time to advertise your vacancy to give you the optimum chance of success?

Similar to any other industry, recruitment has its peaks and troughs. Advertising your vacancy during a busier time for candidate activity means that you're likely going to be exposed to more candidate traffic, however other employers will probably also have the same idea. As such, there will be greater competition for talent.

In contrast, advertising your role during a quieter period for recruitment means that you don't have as many other companies to compete with but there's also less candidate activity. Webrecruit has taken a close look at our application statistics throughout 2019 to provide an overview of apply trends and behaviours.

WHAT DAY SHOULD I POST MY VACANCY ON THE JOB BOARDS?

We often see organisations trying to urgently post their roles before the weekend as there's a common belief that this is the busiest time for candidate activity; this is, in fact, a myth.

Looking carefully at candidate applications from 2019, the most popular days of the week to apply for new jobs was Monday and Tuesday, with 35% of total applications being made in the first two days of the week. In contrast, just 19% of total applications were made at the weekend.

As such, if you find that you're in a rush to advertise your roles before the weekend, it might be worth pausing until the following Monday which will mean that your vacancy is at the top of the list when candidate applications are at their most plentiful.

WHEN'S THE BEST TIME OF YEAR TO ADVERTISE MY VACANCY?

In terms of seasonal trends, January is always a busy month for recruitment – in fact, Webrecruit advertised more roles in January than any other month during 2019 and candidate activity was also high; we received the highest number of total applications in January than in any other month.

It's unsurprising; the new year tends to foster a 'new career' mentality amongst many people and organisations want to hit the ground running after returning from the Christmas break.

September is also a traditionally busy time for recruitment, with school leavers and university graduates starting to look at jobs after their summer off. This is also when a lot of companies start recruiting for seasonal positions over the festive period.

"We often see organisations trying to urgently post their roles before the weekend as there's a common belief that this is the busiest time for candidate activity."

The summer months are typically viewed as a 'quieter' period before the September rush. However, in 2019 we experienced quite the contrary. August saw Webrecruit receive, on average, its highest number of applications per role, whereas this was the month where the third lowest number of vacancies were advertised. This shows that advertising your vacancy in August might hit that sweet spot where candidate activity is high but the number of jobs being advertised is low.

December is typically viewed as a quieter time for recruitment, which is why many companies choose to wait until January to advertise their roles. However, many people start to look for a new job between Christmas and New Year, as the reality of having to go back to work after the festive period starts to sink in.

"It's unsurprising; the new year tends to foster a 'new career' mentality amongst many people..."

APPLICATIONS RECEIVED PER DAY*

DAY	PERCENTAGE OF OVERALL APPLICATIONS RECEIVED
Monday	17.88%
Tuesday	17.34%
Wednesday	16.66%
Thursday	15.52%
Friday	13.37%
Saturday	8.92%
Sunday	10.30%

PERCENTAGE SPLIT OF AVERAGE APPLICATIONS RECEIVED PER JOB, PER MONTH*

DAY	PERCENTAGE OF OVERALL APPLICATIONS RECEIVED
January	8.64%
February	8.64%
March	7.49%
April	7.16%
May	7.20%
June	8.06%
July	8.48%
August	9.36%
September	8.84%
October	8.39%
November	8.87%
December	8.88%

* Data compiled by the recruitment experts at Webrecruit part of the WR Group, and is based on canditate applications submitted for roles advertised by Webrecruit throughout 2019.

APPLICATION PROCESS AND SHORTLISTING

The application process is possibly the most crucial in a recruitment. If your ad has a lot of views but you receive few or no applications your process may be putting people off.

"Receiving lots of standard CVs may not provide you with suitable applications or a diversity of candidates."

Many people now job search on their phones, including applying by phone. Completing a separate lengthy application form is not easy by phone, particularly if your form has not been designed and optimised for mobile devices. On the other hand, receiving lots of standard CVs may not provide you with suitable applications or a diversity of candidates. Finding the right balance for your role may depend on resources available and internal procedures. Wherever possible:

- Review the application process, taking on board learning from previous recruitments

- Set out the process for candidates in clear language and easy to follow steps

- Provide a contact name or email address for candidates to contact you if they need help, i.e. information provided in plain text for screen readers.

Once you have reached the closing date the selection process that follows determines which candidates you see. To achieve a diversity candidate pool at interview it is important to think about how you will shortlist, allow enough time for this and agree the process and selection criteria with the panel.

GUIDE POINTS

1. Decide which selection criteria can be assessed by reading the application form, by a test and interview.

2. Decide how you will score each criterion.

3. Is your scoring based on previous experience of doing the same or similar job, educational attainment and background? Good evidence might come from lived experience, volunteering or paid employment.

4. Decide in advance what your minimum selection criteria are for your shortlist. Disabled applicants who meet your minimum selection criteria should be invited to interview for the role.

5. Decide whether you will be using positive action to address diversity gaps in your organisation.

6. Use indicators for each criterion to assess those who best meet the selection criteria and create a consistent fair scoring system.

7. Remove personal details to reduce bias. This should be done by someone not on the recruitment panel.

8. Disregard information not related to the selection criteria.

LIVED EXPERIENCE

This is an edited version of a blog written by Janet Thorne, CEO at Reach, in February 2020.

You can read the full version at reachvolunteering.org.uk/blog/ditching-cvs-and-cover-letters

Reach has been experimenting with a new approach to recruitment: abandoning CVs and cover letters in favour of three focused questions. It's worked really well for us. The process was fairer and more effective, and candidates liked it too.

Recruiting a strong team is one of the most important things to get right, especially for a small charity. I've never been happy with traditional methods: application forms are cumbersome and shortlisting from CVs and cover letters seems too subjective and ineffective. Too often, I've found that a great applicant turns into a poor interviewee, or I worry that we missed someone with potential because of the volume of words we had to read. I was keen to try a more objective and focused process.

The approach that we followed is essentially borrowed from Applied (**beapplied.com**) who make their excellent resources available for free.

WHAT WE DID

We used this approach to recruit for two very different roles: a service administrator and a head of service.

We honed in on the essential attributes (a mix of skills, experience and qualities) and developed three questions designed to draw out those attributes. We put these questions up on **Survey Monkey** and put this on the job adverts. We asked for contact details and CVs; we kept this data hidden when shortlisting.

We reviewed all the applicants' answers to each question in turn, and scored all of them, before moving on to the next question and so on. We then shortlisted for interview, based on these scores.

"Too often, I've found that a great applicant turns into a poor interviewee..."

WHY WE DID IT

REDUCING BIAS

Unconscious bias tends to creep into the selection process. Doing it this way removes much of this bias at the application stage:

- **Blinding –** by viewing answers without any other contextual data, you are forced to judge candidates on their answers only
- **Chunking –** by viewing answers in isolation, you avoid the 'halo' effect where you start marking a candidate up (or down) because you feel strongly about their previous answers
- **Randomisation –** by viewing answers in different orders, no one candidate gets unfairly penalised by fatigue.

"It's really hard work sifting through CVs and cover letters and making sensible judgements."

MAKING THE PROCESS MORE EFFICIENT

It's really hard work sifting through CVs and cover letters and making sensible judgements. You can expend quite a lot of time eliminating applications where people just bulk apply with little thought, or where they do not meet essential criteria.

INCREASING THE CHANCE OF SHORTLISTING THE BEST CANDIDATES

I was first motivated to try this approach for the entry level role because CVs and cover letters seem a particularly random and unfair way to judge people who are only just starting on their careers. It was so effective in highlighting the actual abilities of candidates that we decided to use it for our senior role too.

The process cuts out the noise and sharpens the focus for both the candidate and the recruiter. While CVs can be misleading, a well designed 'work sample' is the best test of candidate's ability.

WHAT HAPPENED

For our service administrator role, we had a very strong response: over 100 candidates; about 70% decent application. Shortlisting itself was far easier than in the past. It was easier to weed out the poor applications and get a much clearer sense of what different candidates could bring.

We were unable to appoint for our head of service first time round so we had to run a second round of recruitment. We received roughly 40 applications each time, and almost all strong.

The first time, we did not look at CVs until we met candidates for interview. We then discovered that we had shortlisted a good number of people who were very bright and full of potential, but who simply didn't have the experience and seasoned judgement to be able to carry out a senior leadership role. We realised that we had underplayed experience in favour of qualities like openness to learning.

We tweaked the application to emphasise relevant senior experience and did our first sift on that question alone. We then scored the highest-ranking candidates for answers to their other two responses. This gave greater weight to candidates' relevant experience and was more efficient. Once we'd created a shortlist, we reviewed CVs as a way of triangulating. This produced a more balanced shortlist.

"Honestly, ditching CVs and cover letters did feel a bit scary…"

WHAT WE LEARNT

IT IS A BIT SCARY

Honestly, ditching CVs and cover letters did feel a bit scary when we recruited for our head of service because it's such as key role for us, and traditional methods felt more familiar. But the evidence for this approach is compelling.

IT IS A MUCH MORE EFFECTIVE WAY TO SHORTLIST THE BEST CANDIDATES

The process makes it easier to focus in on the key qualities that you need. Candidates focus their applications only on these attributes, and do not include irrelevant details. And it is much easier to compare candidates' answers to questions than it is to compare cover letters and CVs.

The approach is perfect for roles which require little previous experience. It also worked really well for a more senior role but you need to focus your questions and the process to ensure the right balance between experience and potential.

IT REALLY DOES RADICALLY REDUCE BIAS

Viewing candidates' answers without any contextual data, such as where they've worked or details of their education, means that you just focus on the attributes you've prioritised. Seeing each response in isolation means that you cannot build up a mental picture of a candidate (and if you are like me, start willing some to do well because you liked one of their previous answers).

"You need to be crystal clear about the attributes you are looking for, and prioritise ruthlessly."

YOU NEED TO INVEST MORE TIME UPFRONT

It will certainly save you time down the line, but you need to invest more time and effort at the outset. You need to be crystal clear about the attributes you are looking for, and prioritise ruthlessly (no more than six!).

You then need to design questions that test these attributes well. A lot hangs on getting these questions right.

"Confidence in fairness encourages more people from under-represented backgrounds to apply."

CANDIDATES REALLY LIKE IT

We were worried this approach might put people off, but they really liked it. Many candidates spontaneously gave us positive feedback, saying that it felt more relevant than doing a traditional CV and cover letter and gave them a chance to really highlight why they felt they were right for the role. A few even claimed to have enjoyed the process.

Quite a few said that it gave a good impression of Reach. This is important for us, given how competitive the job market is.

Most significantly, candidates said the process felt transparent and fair. This may turn out to be one of the biggest benefits of this approach, especially if confidence in fairness encourages more people from under-represented backgrounds to apply.

With thanks to **Applied** for letting me pinch their resources and ideas.

WHAT QUESTIONS DID WE ASK?

I want to emphasise that these questions sit within a process (define the attributes, design questions to test these attributes, create a marking rubric to assess answers). And we are learning as we go, so our questions are definitely not perfect! I'd recommend following the **Applied** guide to designing work samples.

HEAD OF SERVICE ROLE QUESTIONS

1. Why are you a great fit for this role? Please reference the person specification and draw on your track record of leading and developing a service circa 300–500 words. **This question is a little like a traditional cover letter, but worked better because it elicited responses focused solely on attributes in the person specification with an emphasis on their experience of service management.**

2. Give an example of an improvement you have made to a service you have managed – what steps did you take and how did you assess the success? circa 200–400 words. **To test: user focus, outcome focus; openness to learning.**

3. Suggest a partnership that could add value to Reach. What value would it bring? How would you set about developing it? circa 100–200 words. **To test: ability to develop & maintain partnerships, strategic thinking, understanding of needs of sector.**

SERVICE COORDINATOR ROLE QUESTIONS

1. Why are you interested in this role? To test: enthusiasm for role and for Reach.

2. We devised a customer service scenario. To test: customer service skills. This question did not work very well.

3. Describe an achievement that you are particularly proud of. It can be from your experience of work, education or volunteering. **To test: Self-motivation and ability to use initiative, effort in work, responsibility and reliability; positive can-do attitude. This question worked really well.**

INDISCRIMINATE ROBOTS: AVOIDING HUMAN AND MACHINE BIAS IN RECRUITMENT

Ornella Nsio, Stakeholder Engagement Manager at the Recruitment and Employment Confederation sets out the need to be cautious in relying on technology to reduce bias

Human bias, unconscious and conscious, in the recruitment process is a major blockage for any business trying to achieve a diverse workforce.

From the job ad to the face to face interview, the recruitment process is littered with opportunities for bias which limit career progression. According to **Gaining Momentum**, a global report by the **International Labour Organisation**, five of fourteen barriers to women's leadership were related to discrimination and unconscious gender bias.

This presents a problem not just for the candidate but also the employer, who may have missed out on an opportunity to diversify their team. There's plenty of research that shows diversity is good for the workplace. It increases productivity; it enhances problem solving; and can increase profits.

The business case for workplace diversity has been made, but the question of how to achieve diversity is more complex.

As experts in recruitment, recruitment professionals can help employers evaluate their current recruitment practices and advise them on the necessary changes they can make to help eradicate bias and bring in more diversity.

WOMEN'S CHESS CLUB CAPTAINS NEED NOT APPLY

The Recruitment & Employment Confederation's Future of Jobs report has identified technology as the biggest disruptor in recruitment. In a bid to inject more diversity into an organisation, employers are increasingly turning to A.I and algorithms to eliminate bias in the hiring process.

"Algorithms have long been used by online recruitment boards to promote job adverts toward certain candidates and shortlist CVs by scanning the text for the right words."

The use of algorithms in recruitment is not a new phenomenon. Algorithms have long been used by online recruitment boards to promote job adverts toward certain candidates and shortlist CVs by scanning the text for the right words. However, the use of algorithms in recruitment to help reduce human bias is a fairly new concept.

Artificial Intelligence tools such as **Applied** are being used

41

by employers to reduce bias in the early stages of the recruitment process. **Applied** helps employers write compelling and inclusive job descriptions with gender neutral language. Other tools such as **TribePads' Applicant Tracking Software**, removes all personal and demographic information from the hiring process so hiring managers can assess candidates based on ability alone.

While it is clear that algorithm tools can support more diverse hiring, employers should exercise caution when using them. Algorithms rely on humans to provide the information they base their decisions on.

> *"While it is clear that algorithm tools can support more diverse hiring, employers should exercise caution when using them."*

This means AI can only be as unbiased as the information they are based on. Last year Amazon's own AI recruitment programme was found to be systemising gender biases on a huge scale.

The tool designed by AI experts at Amazon was trained with successful CVs submitted to the company. Unsurprisingly the majority of the successful CVs submitted came from men, therefore the tool began to actively discriminate against female candidates by penalising CVs that referenced women.

One person fell victim to algorithm bias because their CV listed women's chess club captain under the experience section.

DEALING WITH HUMAN AND ROBOT BIASES

Late last year the REC hosted a series of roundtables with members and Centre for Data Ethic and Innovation (CDEI) to discuss how the recruitment industry can tackle algorithm bias in recruitment. One of the key recommendations was for employers to be diligent on the data sets they were using for their algorithm.

Checks should be completed to ensure that employers are supplying the tools with as much unbiased information as possible. The tools should also be tested regularly to make sure there are no glitches in the programming. While there are pros and cons with using algorithms to help reduce unconscious bias in the recruitment process, employers must not rely solely on machines to change workplace behaviours.

There are a number of tactics that can be employed to reduced unconscious bias in the recruitment process, which don't even require WiFi. For example, using name blind CVs and having a diverse interview panel will help reduce opportunities for unconscious bias.

> *"There are a number of tactics that can be employed to reduced unconscious bias in the recruitment process, which don't even require WiFi."*

The REC has created a helpful toolkit with tips for employers on reducing unconscious bias in their recruitment process. The toolkit can be found on the **Good Recruitment Collective** section of the website and accessed by signatories of the GRC. Signing up to the GRC is free and includes access to research reports and training events. You can sign up here: **rec.uk.com/good-recruitment-campaign**

RECRUITMENT AGENCIES AND ONLINE RECRUITERS

You may decide to outsource your recruitment to an agency or an online recruiter. Nearly all temporary vacancies will be filled via an agency.

Senior and high-profile roles are often sent to recruitment agencies. Recruitment is expensive and time-consuming and there is no guarantee of success.

USING AN AGENCY CAN:

- Widen and increase the pool of candidates by advertising wider and carrying out a targeted search for candidates.

- Help you to develop your recruitment process.

- Provide additional resource for candidates through the recruitment consultant supporting them through the process.

- Provide additional resource for your organisation by dealing with the early stages of the process and presenting you with a shortlist of candidates, managing testing, help with questions and providing the feedback to unsuccessful candidates.

For this to work well you need to build in sufficient time for the agency to do the work you have hired them to do.

GUIDE POINTS

- Develop a comprehensive tender brief for agencies – be clear about what you want from them and the role you are seeking to fill.

- Allow sufficient time for agencies to develop and present their proposals.

- Look at agencies' EDI statements and policies and ask them about their track record on placements

- Ask them about the diversity of their recruitment consultants and staff team and what EDI specific training and guidance their consultants have had.

- Ask your network about their experience with the agency, as a client and as a candidate. The agency's approach may affect your brand.

- Agree the fee structure upfront.

- Once you have appointed an agency work closely with the consultant to produce the advert and application pack. It is still your recruitment.

- Be clear about what you are looking for. Do not leave it up to the agency to decide what your ideal is. If you have asked for diversity be clear what you mean by this and be honest about whether you are ready, willing and able to appoint a candidate who is different to current and previous postholders.

- Once the recruitment has concluded provide feedback to the agency and ask them to feedback to you – we can all improve.

RECRUITMENT AGENCIES VS. ONLINE RECRUITERS – WHAT'S THE DIFFERENCE?

Holly Watson, Marketing Communications Executive at Webrecruit sets out the differences between using agencies and online recruiters. Webrecruit is an online recruiter.

If you're considering working with a supplier to assist with your recruitment, it's important to note the difference between a recruitment agency and an online recruitment company. Both types of supplier serve a specific purpose; recruitment agencies actively work to fill your vacancies by sourcing and screening candidates for you, preparing them for interview and handling the offer negotiation process. Working with an agency is a good way of completely outsourcing your recruitment.

Online recruiters, on the other hand, won't do all the work for you, but they will arm you with the tools to help you recruit directly. They'll provide you with job board advertising solutions to attract suitable candidates, as well as technology to help you manage incoming applications and respond to candidates quicker. Often, they will also include CV filtering (to help you save time by categorising candidates for you) and a candidate database search service.

RECRUITMENT AGENCIES

ADVANTAGES
Recruitment agencies can save organisations a great deal of time, particularly if you're working with a specialist agency to fill a niche role. Not only can they help you to source specialist skill-sets faster, they also take on candidate liaison, including telephone screening, arranging interviews, handling follow-up queries and negotiating offers.

DISADVANTAGES
Due to the huge time saving benefits of working with recruitment agencies, they carry a hefty price tag (usually 15-20% of the salary of the role, sometimes more depending on the level). This is tough for many organisations to justify, particularly charities and not for profits who would typically want to put all their money into their cause, rather than paying thousands to a recruitment agency. Additionally, recruitment agencies will charge you per placement, so if you decide to hire two candidates, you'll be paying double the fee.

Many agencies also request exclusivity of the role, so you're limited to just working with them rather than other agencies or an online recruitment company.

ONLINE RECRUITERS

ADVANTAGES

Online recruitment companies are more cost-effective than recruitment agencies as they don't manage the recruitment process for you; they simply provide you with the tools to help you manage your own recruitment process more efficiently. However, many online recruiters offer value added services as part of their offering that can rival an agency-style service for a fraction of the cost, for example advert copywriting, CV shortlisting and candidate mailshots.

There are usually no limits on the number of candidates you can hire from a single advertising campaign with an online recruiter, which is great if you're looking to make multiple hires. You'll also have access to all CVs from candidates who have applied so you can add them to your talent pool for future vacancies.

Online recruiters will usually provide you with access to technology, such as a base level applicant tracking system (ATS), which can help to streamline your recruitment process. Many online recruiters also offer premium ATSs for a licence fee, which can be very useful if you're considering bringing recruitment in-house in the future.

DISADVANTAGES

When advertising a role via an online recruiter, there's no guarantee that you'll fill your vacancy with a suitable applicant. However, the costs incurred are small, particularly compared to the high fees associated with recruitment agencies.

As online recruiters give you greater control of the recruitment process, you won't save as much time as you would when working with an agency, however you'll still save plenty of time compared to how you were recruiting before. For example, online recruiters will manage your job board contracts and negotiate the best rates for you.

There are advantages to using both recruitment agencies and online recruiters; it all comes down to your budget and the level of control you'd like over the recruitment process.

Working with an online recruiter will give you more flexibility when advertising your role; you'll be able to fully brand the advertising campaign and be in control of how your brand is presented. Additionally, you will also have visibility of all candidates who have applied for your role, whereas an agency will typically present you with a small shortlist of the most qualified candidates and set up interviews for them.

When working with a recruitment agency, you need to clearly articulate your rules and objectives when it comes to EDI so you can ensure that your supplier is adhering to these. While some agencies have EDI rules and processes in place, many don't, which puts you at risk of breaking EDI regulations.

Working with an agency might be a good short-term solution but if you need to recruit regularly, it's not a financially sustainable option. It's worth taking the time to get an effective direct sourcing model in place via an online recruitment company and restricting agency usage to niche roles.

THE ISSUE OF CLIENTS BECOMING MORE CONSERVATIVE ONCE THEY GET TO SHORTLIST

Kai Adams, Partner at Green Park, reflects on the challenge of getting clients to take a risk to achieve diversity

Attempting to land at Gatwick recently in the throes of one of the Storms of 2020, the plane endlessly circling in a turbulence-buffeted holding pattern, I got to thinking about one of the most invidious features of my work: approach avoidance.

Kurt Lewin, a founder of modern social psychology, coined the term as something that occurs when a decision-maker moves towards a stated and appealing goal but as awareness of potential negative factors increases, the desire to avoid the goal arises.

Maybe Lewin was a headhunter on the side. His description of what I often see during appointment processes is way too close for comfort. Particularly when the stated and appealing goal is "diversity".

Almost by definition, approach avoidance manifests itself in the final stages. But what if the stated and appealing goal of greater diversity is just that, stated? Words. Not actions. Not real.

In other words, do organisations really want to hire diverse talent or just have some different looking or sounding candidates to take second place?

How else to explain the statistically poor representation of diverse talent at senior levels in multiple sectors?

My concern is that while approach avoidance is most visible from the point of shortlist onwards, it was there all along, right from the start.

> *"…'diversity' is almost always accompanied by a strange flapping of hands as if moulding something from the air…"*

Without exaggerating too much, a typical briefing meeting starts with an exhortation to the headhunter for bigger, broader, more creative thinking. What is meant by 'diversity' is almost always accompanied by a strange flapping of hands as if moulding something from the air, and the coda, "you know what I mean". Actually, I don't. And more often than not, they don't know how to articulate it.

Is it embarrassment? Fear? Ignorance? Best intentions poorly articulated? Do people find the discussion difficult? Awkward?

Establishing a common definition is critical.

Once we've (not) got one, the classic next step is to generate a series of descriptors referencing "scale", "stature", "gravitas", "complexity", "previous experience at a senior level". Never mind that issues of power or social

and structural barriers – let alone (un)conscious bias mean that they've now excluded most women, young people, those with a disability, people of colour etc.

WHAT ARE THE ANALOGUES OF THIS 'TRADITIONAL' EXPERIENCE THAT COULD WIDEN THE GATES WITHOUT LOWERING THE BAR?

At longlist, where there is still little sense of jeopardy and where all bets are still on because the client has its choice of a dozen or more people, confidence and benevolence are high. Even then, the conversation rapidly focuses on those who obviously 'fit': recognised (literally or figuratively) as having the right qualities. Usually, the list is then garnished very generously by some 'wild cards'.

"The person who brings a different way of creating a movement through influence lacks direct management experience."

Describing someone as a 'wild card', 'left field' or 'diverse' is already loading the dice. Let's face it, it's easier for an older, white, middle class male to be viewed and judged as a 'capable' individual because they're the norm amongst the senior leadership population. Anyone 'diverse' is filtered through the lens of their membership of traditionally excluded groups.

It's important to move from this kind of deficit language to something more asset-based.

By the shortlist, the initially enticing differences have become shortfalls, risks,

obstacles. The person who brings a different way of creating a movement through influence lacks direct management experience. The individual who approaches from a different perspective risks destabilising the team. The leader who displays greater transparency or – God forbid! – vulnerability – lacks influence.

"Don't immediately focus on what they're missing. Think instead about what they bring that you lack."

Don't immediately focus on what they're missing. Think instead about what they bring that you lack. Appointment panels skew their decisions towards years of experience, linear career progression or recognised networks. They aim for what they already know, rather than looking for what might add bench strength. They look for overlap with their own skills or those of the organisation, not where difference could increase their influence, reach or impact. If they go for what they know and get it wrong, it seems, they have a legitimate excuse: "it worked last time!" If they go for difference and it backfires, those who say, "I told you so!" are legion.

Being able to say they got "a diverse shortlist and went for the best candidate" isn't enough if the process hasn't been equitable and authentic.

If we're to eliminate approach avoidance, we need to be better at asking the blunt questions whether these 'diverse' candidates were ever going to be appointed and if not, why not. We need to ask them right from the outset and at every subsequent opportunity. If we don't, we risk becoming complicit in counterproductive – or worse, cynical – processes where the stated goal was a fig-leaf, not a fact.

We can't keep circling and circling. At some point we have to land the plane.

TREATING CANDIDATES WITH RESPECT

Lucy Caldicott, CEO of ChangeOut, former member of the EDI Panel and former Director of Fundraising

It's hard work when you've got a vacancy to fill. Everyone's stretched and stressed and eager to get the new person in as soon as possible. So it's easy to forget that it's equally stressful for the people looking for jobs who are at the other end of your recruitment process. You don't know how many other jobs they might have applied to, yet they're having to put their best foot forward to apply again.

They're likely to be juggling many other commitments, alongside making themselves available for interview, often at short notice and always during working hours.

So, in order to give them the best chance to make a good impression, and also to make sure that everyone who applies is left with a good impression of your charity, it's important to treat all applicants and candidates with respect.

"...your organisation holds the power in terms of making a decision regarding which person to hire..."

As my grandmother would say, *"Do as you would be done by."* We've all been on the receiving end of disorganised and bad-mannered recruitment processes so let's not be guilty of them ourselves when we're in charge. Also remember that this is a conversation between equals. Yes, your organisation holds the power in terms of making a decision regarding which person to hire, but don't forget that you need them and you need them to do a great job for you from the outset. They may be talking

to other employers, so don't let yours be the one they turn down for giving a poor impression during this process.

You should hopefully know if there are people internally who might be interested in this role. But if you don't, never assume that there isn't someone already within your team (or in another team internally) who's looking for a new challenge.

"Internal and external candidates should be treated equally and fairly."

So make sure you send the job ad round internally and also offer internal people an opportunity for an informal conversation about the role. Internal and external candidates should be treated equally and fairly.

If there is an internal candidate, don't feel you have to interview them if you don't think you have the right skills or experience but do give them an opportunity for feedback about why they haven't been shortlisted and what they might need to do to get shortlisted next time. It can be twice as disheartening if you're internal and not shortlisted as it's easier to think it might be personal as people know you so you owe it to your people to give them solid, constructive feedback.

HERE ARE SOME POINTS TO THINK ABOUT WHEN YOU'RE RUNNING A RECRUITMENT PROCESS:

Put yourself in the candidates' shoes and be professional but try to put them at ease by being kind and friendly during the process. Show off your charity's best side from the outset.

Offer the opportunity for people to have an Informal conversation before applying and make it clear who this is with so they can prepare accordingly. Is it a HR team member or is it with a fundraising team member or is it with the line manager of the role?

Maybe suggest the kind of things they might want to ask about in advance and make it clear that this isn't a hassle and that people are actually encouraged to make use of this opportunity.

"Put yourself in the candidates' shoes and be professional but try to put them at ease by being kind and friendly during the process."

Try really hard not to mess people about and to give them plenty of notice in advance of key dates along the process. In fact, plan the interview date first and then work backwards so you can include it in your job ad so people know in advance when it is and can plan accordingly.

If you do have to make a change to a date, let people know in good time.

Tell the candidates who is on the panel, their job title and why they are on the panel so they can plan accordingly. You want the candidates to give their best so everything you can do to reduce the number of surprises will help with this.

Make sure you give people enough time to prepare for any tests and presentations that you require.

Let people know that they haven't been shortlisted. Some charities say they can't let people know because they're a small team or whatever but how much time does it take to drop unsuccessful candidates a quick and kind email?

"You don't want anyone to get the impression you don't care about the people that care about you."

It'll leave them feeling better about your organisation and who knows, they might have personal experience of the cause you work with so maybe they're also your beneficiaries. Or maybe they or their family members are supporters. You don't want anyone to get the impression you don't care about the people that care about you.

Make sure you offer feedback to applicants. Applicants that are called forward to interview should be given the response in the timeframe that you mention during the interview.

Tell them what the next steps are going to be and when and stick to them. Build in extra time if you think it might be delayed.

Let unsuccessful candidates know and offer them an opportunity for a telephone call feedback with the hiring manager. This is really important and really isn't very time consuming to have a brief conversation running through the key points and is very helpful and respectful to them.

INTERVIEWS

Lucy Caldicott, CEO of ChangeOut, former member of the EDI Panel and former Director of Fundraising

PREPARING QUESTIONS AND TESTS

In many ways, unless the job requires being your best self for 45 minutes being interrogated by three strangers, job interviews aren't a very good way of assessing who's the right person for a job. It's very difficult to recreate the actual day to day realities. All you've got to go on is how someone answers the questions in comparison with other interviewees. Therefore it's vital to prepare every aspect of an interview process really thoroughly. And, in order to give everyone the chance to do their best, make sure you're helping to put them at ease as best you can.

As a rule of thumb, three people is probably a good number for an interview panel: the hiring manager, someone else in the fundraising team that is ideally a peer of the hiring manager or someone who's going to work closely with the role holder but from a different team, and someone dispassionate, ideally your HR business partner.

Maybe think about creating a diverse panel which will definitely show intention and help to hire people from a diverse background. Never interview someone on your own. If necessary, a panel of two is fine, depending on the seniority of the role, three might be overkill. Four and above is too many, maybe ok for a very senior role.

Don't make any tasks unnecessarily burdensome. Again, you want the best out of the candidates so make sure they've got enough time to focus on prepping for the interview rather than wasting time on creating beautiful-looking presentation slides. Really think about what you are testing from each element of the selection process.

If there is a presentation task, what is it testing? If it's about finding out about how they'd approach a strategic question, remove some of the stress by asking for a presentation without slides. You want to hear about their ideas rather than whether they can create a beautiful set of slides. If you do want to test whether they can make a beautiful set of slides, give them a written test on that instead.

> **"Make sure you've read the CVs and written applications before the interview itself. It's unprofessional to only look at these during the interview itself."**

Prepare in advance If you've prepared the job description and person specification thoroughly, you'll know already what the key skills and competencies that you're looking for are and you can prepare the questions accordingly.

Prepare in good time, so that you can share the questions with the other panel members and, ideally, prepare who's going to ask which question.

Make sure you've read the CVs and written applications before the interview itself. It's unprofessional to only look at these during the interview itself.

Consider planning a meeting in advance so the panel can prepare together.

If you allow something like seven-ten minutes in total for any presentation tasks and

follow up question, you've only got time for around eight questions, leaving enough time for candidate's questions at the end in a 45 slot.

Always plan fifteen minutes in between slots too to allow for comfort breaks and over runs and plan in some time for lunch.

Try to limit the shortlist to a maximum of six to enable the panel to give adequate attention and consideration to each candidate. But don't see people for the sake of it. If you've only got three shortlistable candidates, just interview them.

Each question should clearly relate to an aspect of the person specification and should allow the candidate to tell you about examples of what they've personally done to demonstrate those skills. For example, a key element of the role might be developing partnerships.

"Whilst delving in a bit more deeply into topics or veering off topic a little to keep the tone conversational, do make sure you stick to the questions as asked and that panel members do too."

A good question therefore might be: Tell us about a time when you had a partnership you found difficult to manage, what you did about that and what you learned from the experience.

Whilst delving in a bit more deeply into topics or veering off topic a little to keep the tone conversational, do make sure you stick to the questions as asked and that panel members do too. The questions should be designed to fulfil a purpose.

Make sure the questions are clear and concise. It's really awkward for a candidate to have to ask for a questions to be repeated and even more awkward if a lack of clarity means they answer a different question than the one you're asking.

Make sure you let the candidate do most of the talking, probe if necessary. Maybe include suggested follow up questions for the panel for each question, just in case a candidate isn't very forthcoming.

Make sure you listen and take notes of what they're saying. Look interested! There's nothing more off-putting than an interview panel that looks bored.

It's important to think through the purpose of written tests. Don't just include them for the sake of them and make sure they relate to an element of the job description.

Make sure you have a quiet room to have the interview and that there is enough space. Try and lay it out to put the person at their ease. It's nice for one of the panel to come out of the room to collect the interviewees and show them where they are to sit. This gives a bit of an opportunity for small talk to put them at their ease. But don't be over-familiar. This is a time to be approachable and friendly, not for jokes.

Make sure they have a glass of water.

Make sure you take the time to introduce each member of the panel and explain how the interview is going to work.

If there's a written test, make sure there's somewhere for them to do this in peace and that all the equipment is working.

Have someone lined up to welcome candidates and manage their movement through the process. If you don't have an HR team, maybe there's someone else in the office who could play this role.

POSITIVE ACTION

If you've identified that people with certain protected characteristics are under-represented in your organisation and you are looking to use recruitment as a tool to try to address this, it is even more important to prepare and use a valid set of questions that are relevant to the skills required for the role. By law, you can choose,

for example, a black person over a white person, in an organisation where people from ethnic minority communities are under-represented versus the population where the organisation is based. But, you can only do this if the two candidates are equally suitable for the role. You have to have identified that people with the protected characteristic/s are under-represented or suffer an unfair disadvantage because of it. Question preparation and adequate listening and recording are therefore vital so that you can assess whether candidates are equally qualified or not.

In a recruitment scenario where there are two candidates – one who has a protected characteristic, and one who does not - that are deemed to be equally qualified for a specific role, an employer could offer a role to the individual with a protected characteristic. This action is called a tie-break scenario, and is allowed under the Equality Act 2010 to help address historic and social disadvantage.

Always make sure you have enough time for the candidate's questions.

Make sure you sum up with clarity about next steps. Is there another interview round? Is there an opportunity to meet prospective colleagues? When will you let them know whether they've been successful or not?

Always thank the candidates for coming and for their interest in your organisation.

"Show your organisation off at its best."

JOB OFFER AND APPOINTMENT

It's really important for the job offer and contract process to be professional. Show your organisation off at its best.

Personally, I think it's nice to surprise the successful candidate with a call the morning after you've seen them or as soon as you've decided, offering them the job. That way, you show them how keen you are to welcome them to the team. You don't want them to mentally check out of the process with you. They may still be in selection processes at other employers so you want them hooked in to you asap!

Be prepared for the candidate to negotiate on salary and start date. It is, after all, a good moment to do this from their point of view. In interviews, I tend to ask all candidates whether they're comfortable with the salary range and terms and conditions, in order to try to begin that conversation early on - being careful not to let how they respond influence me in any way.

"Once the deal is done, don't leave it for weeks to get the offer letter out."

Once the deal is done, don't leave it for weeks to get the offer letter out. It gives a really bad impression if a simple admin task like sending out an offer letter can't be done within a couple of working days. In addition, many candidates will be waiting to receive the letter before they resign so the longer you leave it, the longer it will be before they can hand in their notice and confirm the start date.

Most of the contract and offer letter content will be the same for all new recruits so it should be a simple edit job. For some reason, many charities are very slow at this.

"One area which seems very inconsistent across and within charities, is personal and professional development plans for individual members of staff."

WELCOMING YOUR NEW RECRUIT TO THE TEAM

Induction and probation processes often don't get adequate planning and forethought but have a big effect on how quickly your new recruits will settle in. If you've offered the role to someone from a community that is currently under-represented in your charity doing this well is even more important as they are likely to feel even more isolated when they join.

One area which seems very inconsistent across and within charities, is personal and professional development plans for individual members of staff.

Plans that are discussed at least once a year at appraisal time but can also be put together right from day one. Discuss training and development needs with your new recruit. Not all of it will be possible but when they are new, activities like buddying, work shadowing, a couple of inexpensive training and make sure that

"It's important to set short term objectives and conduct regular reviews with your new team member to make sure any issues are addressed quickly. "

Probation periods aren't compulsory but they are useful to help both employer and employee ensure the new recruit has the tools necessary to perform well in their new role. It's important to set short term objectives and conduct regular reviews with your new team member to make sure any issues are addressed quickly. Don't wait until the end of the probation to pick things up with them.

This really doesn't give them time to address any learning points. Regular performance reviews give an opportunity for the line manager to give any feedback and for the employee to ask any questions that they have and if there are any issues the probation period provides an opportunity and time to put things right.

- **Make sure they know what time to get there on their first day and be there to welcome them.**

- **Show them around the office and introduce them to people.**

- **Make them a cup of tea!**

- **Have a series of induction activities mapped out for them in those early weeks, with introductory reading and any compulsory or useful training set up for them to do in down times.**

- **Have regular catch ups with them and make yourself available and approachable if they need you**

- **Ask them if there's anything they need or anything they're worrying about**

- **Maybe organise a team lunch in the first week.**

- **Remember how you felt in your early days and think through the things that would have helped you settle in.**

EVERYTHING YOU NEED TO KNOW ABOUT ONBOARDING EMPLOYEES AT YOUR CHARITY

This is an edited version of a blog for the CharityJob recruiter advice blog by Jean Merrylees, freelance content writer and editor who has previously written for the BBC.

It doesn't matter how big or small the charity, or how junior the role—good onboarding is essential if you want to retain the best talent. The first 90 days in a new job – otherwise known as the golden period – is a vital time for employers, allowing them to reap unparalleled rewards in terms of employee retention, engagement, satisfaction and productivity. According to research conducted by the Aberdeen Group, an engaged employee is 87% less likely to leave a company in the first twelve months, and effective onboarding increases that employee engagement by 20%.

"Effective onboarding increases employee engagement by 20%."

In 2018, Andrew Hyland (Head of Recruitment and Resourcing at Macmillan Cancer Support) spoke at Fundraising Week, putting onboarding as the HR practice with the second greatest impact on a business after recruitment. And it's likely to become more important post Brexit when it's expected there'll be an even greater premium on attracting and retaining good candidates. So, how can you make sure you're using the best practices to integrate a new starter into your charity?

CHARITY SPECIFIC CONSIDERATIONS

It's worth mentioning that onboarding can vary from charity to charity. Size often dictates how streamlined your practices can become, so not every organisation will be able to set up the same onboarding system. Big brand charities can operate just like corporations in the private sector with large HR departments and sophisticated onboarding procedures.

Most charities don't have these resources, but the same principles apply and can be adapted to any budget. What's essential is that you don't leave this to chance or think you can call in favours from colleagues just before the new person walks through the door. Preparation is key and far more important than any onboarding software package or induction programme.

Don't forget that an onboarding process is also an opportunity to introduce new starters to the culture and ethos of your organisation; it's doubly important to do this well in the charity sector where it can be more meaningful than in other sectors. Even if it's a role that isn't as hands-on with your charity's mission—like IT or finance—all new starters will benefit from feeling valued as part of an organisation that's making a difference.

IT STARTS WITH RECRUITMENT—AND INCLUDES THE INTERVIEW

The onboarding process doesn't start the moment someone accepts the job. It's earlier than that. The impression you, your organisation and your brand make during the recruitment process is critical. Make a good impression here and you start building integration early. Like eating well during pregnancy, it provides the best circumstances for a healthy start!

> **"The impression you, your organisation and your brand make during the recruitment process is critical."**

According to the Aberdeen Group, 70% of new hires make the decision to stay or leave within the first six months. Make a bad impression and it'll affect how a candidate views the charity in the longer term, whether successful or not. And of course, bad experiences and bad reviews spread like wildfire, particularly in an era of Glassdoor, LinkedIn and a growing candidates' market.

Don't be a stranger. Make contact before the first day.

Get in touch in the week before a new starter's first day in the way that seems most appropriate for the role. It could be a phone call or friendly email to check they've got everything they need. Or you could see if they've time to meet up for a coffee with you and/or one or two other colleagues before they begin. Larger organisations may have a portal that new starters can log in to before their first day.

Take whatever seems the right approach for the job and size of the charity, but make sure that a new starter at least knows the start time for the first day, how to get there and who to ask for when they arrive. It helps give them a rough outline of what to expect from that initial week.

HOW TO PREPARE FOR THE FIRST DAY

Have a checklist of the things they'll need on that first day and make sure they're all done in plenty of time.

THINGS TO TICK-OFF INCLUDE:

- **Someone to meet them in reception**
- **Staff pass**
- **Desk/workspace ready**
- **IT set up complete**
- **Necessary paperwork readily available**
- **Company (or department/team) email introduction**

SCHEDULE FOR THE FIRST DAY AND BEYOND

The first day can be intimidating for any employee, no matter their experience level, so prepare for this carefully.

Draw up a schedule you can give to the new starter and make sure that everyone involved in their induction knows exactly what they're being asked to do and that the time is booked out of their diary.

CLARITY, CLARITY, CLARITY

Overall, it's absolutely crucial that you provide complete clarity around expectations for the new person for the first day, week and beyond. Set up short-term and long-term targets with a clear time frame. Stick to a schedule for regular catch-ups and always provide clear feedback. Follow up in writing. Have complete transparency around expectations and make sure they're communicated to everyone involved so that your new starter isn't confused by conflicting expectations of their role from different people within your organisation.

THINGS TO CONSIDER HERE INCLUDE:

- **A first-day lunch, coffee or informal team meeting.**

- **An induction meeting with their manager.**

- **Who do they need to see from other teams? Set this up.**

- **Work shadowing? Be careful here. It can seem an easy fix to send a new person to spend time with a colleague in a similar role, but it can also come over as lazy on your part and often doesn't achieve much. Make sure the new starter is learning something productive rather than feeling like a nuisance.**

- **Keep a tight schedule for the week and have complete clarity over who's responsible for them during those first few days. If it's you, then you must own this and make sure you've put time into your diary for regular catch ups.**

REMEMBER, NO ONE HITS THE GROUND RUNNING

In fact, it's a physical impossibility. So, be prepared that however excellent and committed, a new person will make mistakes and learnings are inevitable. They also won't do the job in exactly the same way as their predecessor, so give them some slack here and let them make the role their own

FLEXIBLE WORKING

The case for flexible working is one for recruitment and retention, particularly for high-pressure, target-driven roles like fundraising. Creating a prohibitive culture for:

- Parents
- Carers
- Women returners to work
- Older people
- People with or who develop a health condition or disability

Lack of flexible working is an issue for people progressing to senior roles; we know that women who do well at entry-level may struggle to climb the career ladder after returning from maternity leave and for disabled people.

Offering flexible working only for those in management, specialist or the most senior roles creates an image of an organisation that only values those who have risen up through the ranks or have specialist, hard to find skills and knowledge. It misses the point on achieving equity and doesn't attempt equality.

Respondents to the Chartered Institute of Fundraising recruitment survey cited flexible working as good practice for recruitment and as reasons for leaving (to get flexible working) and staying in a role. Other research from Leonard Cheshire cites 87% of the general population want to work flexibly but only 11% of jobs are advertised a flexible. The 4 Day Week Campaign for 'good work' argue for a four day week to enable a better work/life balance, creating opportunities for learning, development and volunteering and

a healthier society. Some research suggests that flexible working is an advantage in recruiting and retaining younger people in a competitive market.

Include flexible working on job adverts, wherever possible, so that candidates can be open about their requirements and not have to wait until they have passed their probation.

FLEXIBLE WORKING OPTIONS:

- Flexible start and leaving times, e.g. 10 to 4 as core hours
- Flexitime – working the full hours (as agreed) but at times that best suit the worker
- Part-time working
- Job-share
- Compressed hours – either a four-day week (for full time) or 9 day fortnight (full time)
- Working from home
- Term-time working
- Staggered hours
- Sabbaticals
- Phased return to work (maternity or sick leave)
- Phased retirement

FLEXIBLE WORKING AND JOB SHARING

Helen Reed, Senior Trusts Manager at ActionAid talks about flexible working and how it has helped her career to progress

Flexible working has been hugely important in making it possible for me to balance my career and caring responsibilities.

Over the past four years the **British Red Cross** and **Action Aid** have offered me flexible working in ways which meant I could maintain and progress my career. For the British Red Cross, flexible working meant retaining me for an extra three years and for Action Aid it made it possible to recruit me.

Both organisations have explicit commitments to flexible working that positively shape their cultures and working environments. Action Aid makes this commitment an active part of their recruitment which made them stand out when I was looking for a new role.

"It is challenging to form job share partnerships and the opportunities for job sharing are sparse."

As part of my search for flexible working I have explored the option for job sharing. It is challenging to form job share partnerships and the opportunities for job sharing are sparse. Yet my research shows there is a lot of potential for organisations and individuals if we can make this form of working more readily available.

When I returned to work after the birth of my first daughter, like many parents before me, I made my flexible working request. I requested 21 hours a week and, fortunately, my request was granted. The British Red Cross and my manager were open to flexible working and we soon fitted into the new way of working.

"Motherhood and part-time working had not dampened my interest in my job."

The flexibility worked well for both my employer and me. For me it meant continuing in the job I loved because without it I could never financially or logistically afford to work. For the British Red Cross it meant retaining my knowledge and skills.

Motherhood and part-time working had not dampened my interest in my job, I just couldn't invest 37 hours a week at this point in my life. I continued to learn and grow and after a few years it became time to take the next step in my career. That was when I realised how rare part-time roles are and how difficult it was going to be to progress.

I realised I needed another option.

At the same time another fundraiser I knew was making a great success of job sharing. She and her partner had not only made one role work but had also successfully applied for a new role together. My friend talked passionately about the advantages of job sharing for both organisations and individuals. I knew that this was a model I wanted to try. But how to do it?

So, I decided to take a two-pronged approach. I would seek out a partner to make applications with and, at the same time, I would contact hiring managers and ask to be considered on a job share basis. Neither approach proved successful or even viable.

I reached out through my networks, seeking individuals whose skills, ambitions and requirements fitted with mine. But networks are limited and finding a partner this way requires a lot of luck. However, on the way I started having conversations with existing job sharers, which were inspiring and informative. I felt each conversation reiterated the same points; job sharing could be hugely beneficial – it helped with continuity, it brought more diverse skillsets and it enabled part time workers to fulfil demanding roles.

I signed up to job sharing websites but I often found myself matched with people working in marketing or sales instead of fundraisers. There just wasn't the critical mass of potential matches.

I also started having the conversation with potential employers. When I found roles that interested me and fitted my skill-set I would phone the hiring manager to discuss flexible working options including job sharing. Sometimes, I was met with polite refusal and sometimes I couldn't get a response. On one occasion I was told that 'it's not convenient' to consider my application (the job went through to a second round of recruitment). On another, I was invited to apply but I was not short listed due to a 'high volume of great candidates'. It was very dispiriting.

This was until I saw a job advert from ActionAid. From the start it was a very different experience. At the top of the job advert it indicated that flexible working and job sharing were positive options. Within the application form there was a section to indicate an interest in job sharing. No worrying about how to broach the subject. It was the first time that I felt I was on an even footing and it was exciting.

> *"My requirement to work 21 hours a week didn't need to be a factor. However, it was something I addressed in the interview and I was immediately met with a positive and welcoming response."*

I was invited to interview. The recruitment process was blind. My requirement to work 21 hours a week didn't need to be a factor. However, it was something I addressed in the interview and I was immediately met with a positive and welcoming response. To my delight I was offered the role at 21 hours a week and have accepted. We have decided to wait until I am settled into the team to decide how to resource the other 40% of the role.

ActionAid's approach means that I am excited to be taking up a new role that will challenge me while making the most of my experience. It makes a huge, important statement about their commitment to being a great employer and feels like it is indicative of a strong organisational culture.

Hopefully, for ActionAid it means having a broader selection of candidates and being able to fill the role quickly and effectively with the right person.

And of course, it means I didn't hesitate to accept the role.

INCLUSION

Inclusion is about respecting people, making them feel welcome and safe to be authentic and fosters belonging and connection to your organisation, cause, team and to their role. The concept of inclusion should not be overlooked when recruiting and retaining fundraising talent.

High turnover of staff will have more than one reason but feeling unheard and unappreciated is commonly cited as a reason for moving on. Looking at why people feel unheard and unappreciated can reveal that people feel unwelcome because of their difference.

Inclusion takes practice, patience, good communication and doing things differently. Most of it is common-sense and placing the concept of inclusion at the centre of your organisation will:

1. **Require you to listen to your employees – what ideas do they have to improve the organisation and recruit for diversity and cultural addition, rather than current culture fit;**

2. **Stop you making excuses why person X will not fit into the organisation or role – address your unconscious bias;**

3. **Ensure you are accountable to your employees, them to you and together to your stakeholders and the mission.**

Inclusion should be part of the organisational culture, its values and its goals. This makes inclusion everyone's responsibility.

GUIDE POINTS

- Have an EDI policy and statement in place that covers inclusion

- Offer EDI and unconscious bias training for all staff but for hiring managers and recruitment panels as a minimum before starting recruitment

- Operate an anonymised recruitment process (sometimes called blind recruitment). This will require additional resources

- Advertise roles with an inclusion statement and link these to your values and mission

- Offer flexible working

- Offer working from home

- Avoid stereotypes

- Don't make assumptions

- Don't finish people's sentences

- Ask people what pronouns they use

- Provide information and resources to help and guide preparation for an application and interview

- Be flexible about interview and test times. This can be difficult, but you can consider offering more than one interview timeslot so that candidates have choice

- Ask applicants if they require you to make any adjustments, e.g. additional time for tests or step-free access

- Check the religious holidays calendar when setting the recruitment timetable

- Celebrate holidays from different cultures in your workplace

- Look at your images and language used

- Don't use 'beneficiaries' for service users

- Clear policies and practice on zero tolerance to bullying and harassment

- Rotate chairing of meetings and interview panels

- Think about the start, break and end times for events

- Create time for people to learn about each other

- Consider when and where you hold social events. Are you excluding people by holding these over breakfast meetings or after work in a pub?

- Make diversity and inclusion activities a part of peoples' professional development

- Include colleagues working from home in all relevant meetings and events

- Say thank you to colleagues and to applicants

MAKING THE WORLD A BETTER PLACE

This blog sets out one person's experience of working with different major charities. This blog is anonymous to protect the individual and so that they can continue to find work in the sector. The blog has been written by a BAME Person of Colour. It also anonymises the large organisations as they may have improved, be working on improving their diversity and to help protect those still working there who may be raising issues around diversity and inclusion.

I didn't think much about EDI issues when I first joined the sector. All I really wanted to do was make a difference to people and try to make the world a little better.

I was very lucky and landed in an organisation who back in the early 2000s were running sessions for staff on race and how it feels to be a minority. Although the charity I joined was by no means diverse it was trying to do better.

As I moved in to international development the picture started to become clearer to me. It seemed strange that almost all the diversity came from the advertising materials. And despite big bold claims about female empowerment which were directed towards developing communities, there was very little happening internally to reflect the values we were preaching.

CULTURE

I've had one particularly bad experience of EDI which I didn't even recognise until I left the organisation.

It was a feeling of otherness, not fitting in and constantly questioning what I was doing wrong and could have done better. A feeling of being uncertain about my place, needing to justify myself and wondering if I was 'the right fit'. I internalised all the feelings I was having and

assumed it must have been me and by the time I left the organisation my confidence was at an all-time low. It wasn't until after I left and spoke to others who had similar experiences that I began to realise that it wasn't me at all.

"A feeling of being uncertain about my place, needing to justify myself and wondering if I was 'the right fit'."

It was that the organisation had tried to do diversity without thinking at all about inclusion. They had hired lots of different types of people and made no provisions for adapting the culture, which was one of misogyny and bullying. Just hiring diversely isn't enough if you don't also work on inclusion. All you're doing is changing the staff photo, not the staff culture.

After my experience in that workplace I took some time out of work and it took a lot for me to go back in.

"Just hiring diversely isn't enough if you don't also work on inclusion."

LIVED EXPERIENCE INCLUSION/EXCLUSION

Before applying for a job I ask about workplace culture and find out what their stance is on EDI. I am lucky because I have the option to walk out of a job if I have the same experience I had previously. And having been through it I would walk out in a heartbeat this time round.

RECOGNITION AND ACTION

My current place of work has a long way to go when it comes to EDI, but they know it and they are willing to put the time and work in to change. The SMT is willing to engage on the issues and know that walking the walk is as important as talking the talk. It's been refreshing to work somewhere that welcomes the conversation and is willing to acknowledge what it doesn't know and try to improve. As an organisation you don't have to know everything or be an expert in these issues. You don't even have to have been doing it well so far.

Inclusion is about being willing to try and to learn and to put your (probably not very much) money where your mouth is. And in return you'll get a happy, loyal workforce who perform better because of their diversity, not in spite of it.

"It's been refreshing to work somewhere that welcomes the conversation and is willing to acknowledge what it doesn't know and try to improve."

FIT

Jaz Nannar, founder of Jaz Nannar Consulting, and member of the EDI Committee reflects on what is meant by 'fit'

I headed up a strategic and creative agency for the charity sector for many years. Over that time, I've worked across a huge range of causes and charities, from health care to saving nature, from medical research to faith. I've interviewed hundreds of key stakeholders at charities and many more of their supporters.

Our clients (and some of the prospective ones) sometimes asked to see our policies on the environment, on health and safety and, in one notable patch, our way of complying with modern slavery rules.

Suffice to say we were all clear on the modern slavery front... but no-one asked me about the make-up of our strategy, creative and account management teams. As it happens, we were around one third BAME, which shouldn't be surprising given we were a London-based agency. But, if you use agencies, how many of them

> **"People are drawn to versions of themselves. There's a safety in it. A comfort."**

- be they creative or media - can say the same? How many of you can say the same? Particularly if you're based in big towns and cities with ready-made access to a wide pool of people.

People are drawn to versions of themselves. There's a safety in it. A comfort. And if you're told that you're not quite the right fit for the role/charity/agency, if you are from a BAME background looking out at who already works there and who got the job ahead of you, you wonder if that's code for something that you can't change about yourself.

> **"I'm here to tell you that 'not being the right fit' is the strength that's staring you in the face."**

In the past, when I've written on this subject, colleagues would cast an eye over my words and tell me I didn't need to put my story front and centre, because my argument shouldn't need it. They are absolutely right.

But if I don't, will you remember what I say?

So, I'm here to tell you that 'not being the right fit' is the strength that's staring you in the face. More of the same and more of who and what you know is surely not what fundraising needs right now.

In some recent insight gathering staff interviews, I heard a brown-skinned Muslim woman say she's been

"A brown-skinned Muslim woman say she's been in the same role for 10 years and watched all her white colleagues get promoted before her."

in the same role for 10 years and watched all her white colleagues get promoted before her.

You will feel something as you read that sentence.

I will feel something as a brown-skinned woman.

This is 2020. She works for a huge charity. She'd been told versions of 'you're not the right fit' for 10 years. And she stayed, believing that things wouldn't be much better at any other charity.

A friend of mine told me about sitting on an interview panel recently. He wasn't the key decision maker. But those who were, were adept at finding ways to say they thought one of the candidates wasn't right for the job because she might be 'difficult to manage'. Perhaps a 'tad confrontational'. Perhaps 'not quite the right fit'.

Perhaps.

Or perhaps it's just a lazy, disgraceful racist trope about black women.

This sort of thing doesn't get fixed by putting a token 'diverse' candidate on the list of people who get interviewed. It begins with charity leaders, fundraising leaders being braver. Having the courage to admit something isn't right and not rushing to hire a sole EDI person to have the impossible task of solving this.

I'm not saying it's easy. It's not meant to be. But it's the right thing to do to question ourselves and each other and the recruitment processes that are in place that mean things haven't changed much. And even if it wasn't the right thing to do, the business case for more diverse teams – be they fundraising or not – has been proven many times over.

"I don't think the same as everyone else because I don't usually come from the same background as you. That's the strength."

It is possible to do things differently.

I've been working with a big nature charity recently. On paper, perhaps I'm not the right fit. I grew up a mile away from Heathrow Airport and nature didn't feature in a big way in my childhood.

But I have a different perspective and a different approach. I have interviewed key stakeholders and engineered conversations about good fairies and bad fairies that, believe it or not, have unlocked interesting answers that haven't been heard before. Invariably, senior directors be they in charge of clinical teams, conservation teams or chaplains will say that they found our conversations interesting and thought-provoking. And to be honest, I do too. Their lives and experience are so far removed from mine.

I don't think the same as everyone else because I don't usually come from the same background as you. That's the strength.

That's what the disabled person you're interviewing brings.

That's what the darker-skinned person who knows what it feels like to be judged on the colour of their skin brings.

That's what the gay person who has been on a journey with their family and friends brings. We are all the right fit. If only you could see it.

RECRUITING DISABLED PEOPLE AND REASONABLE ADJUSTMENTS

The statistics on disabled people and employment tell a story of failure in recruitment, retention and inclusion:

- **Approximately 7.9 million people of working age are disabled, 19% of the working age population, but only 53% are in employment and there is an unemployment rate of 6.7%, compared to 3.7% for people without disabilities.**

- **Combined with those who are not currently seeking work the disability employment gap is over 28%.**

- **Only 3% of fundraisers have declared to have a disability, compared to the 18% of working-age adults in the UK who report a long-standing illness.**

- **Research by Leonard Cheshire states that 24% of employers say they would be less likely to employ someone with a disability.**

- **17% of disabled adults who have applied for a job in the past 5 years say that the employer had withdrawn their job offer as a result of their disability.**

- **83% of disabled people acquire their disabilities while in work**

- **Approximately 300,000 fall out of work due to health conditions**

- **40% of the working age population are predicted to have a long-term health condition by 2030**

What can you do to help change this picture?

GUIDE POINTS

1. **Encourage applications:** include a statement on your job advert that sets out your values and commitment to EDI.

2. **"Disability Confident":** join the scheme and display the logo on your advert, your website and all communications

3. **Intention:** be active and intentional about your approach to recruiting disabled people. This means thinking about what you need to put in place before you start the recruitment.

4. **Contact:** provide a trained and informed point of contact for disabled candidates.

5. **Legal obligations:** read and understand your obligations under the Equality Act 2010 and read up on disability rights.

6. **Flexible working:** offer flexible working for all roles.

7. **Working from home:** now that many roles have been working from home you will need to be clear why any role can't be delivered in this way.

8. **Fonts:** use fonts that are easy to read, 12 points and larger and avoid italics or odd symbols that screen readers cannot process.

9. **Formats:** offer alternative formats for application forms, such as large print forms and colours that enable dyslexic people to read easily.

10. **Review:** is a driver license is absolutely necessary for the role? What you need is someone who can travel, not necessarily drive. Are there are other requirements that can be met in different ways?

11. **Avoid using terms like "fluent" for communication skills.**

12. **"Access to Work":** look up what adjustments can be supported by an Access to Work grant, such as travel, support and technology.

13. **Reasonable adjustments:** can you make adjustments before recruitment, that benefit all? Be prepared to discuss reasonable adjustments with candidates and employees.

The Equality Act 2010 defines disability as a physical or mental impairment that has a "substantial" and "long term" effect on a person's ability to carry out normal day to day activities. Not all disabilities are visible, some health conditions may be chronic and have a substantial, long term affect.

HIDDEN DISABILITIES INCLUDE:

- **Sight loss and blindness**
- **Deafness or hearing loss**
- **Learning disabilities**
- **Cystic Fibrosis**
- **Crohn's disease**
- **Neurodiversity**
- **Depression**

- **Fribromyalgia**
- **Epilepsy**
- **Diabetes**
- **Chronic Fatigue Syndrome**
- **Traumatic brain injury**
- **HIV/Aids**
- **IBS**

Candidates and employees may be reluctant to disclose their disability. They may feel anxious, embarrassed and worried that colleagues and managers will treat them differently. Creating a culture of inclusion, support and trust takes time and is an active process. A culture where everyone is expected to work through lunch and/or work late could mean someone is not able to manage their pain levels, energy and attention levels or take medication on time.

REASONABLE ADJUSTMENTS

- **Flexible working hours**
- **Breaks during the working day**
- **Working from home**
- **Time off to attend disability related medical appointments and treatment**
- **Flexible role duties (e.g. no long-distance travel)**
- **Adapted office furniture**
- **Specialist IT equipment**
- **Work trials – in place of or alongside formal interviews**
- **Physical adjustment to the building (where possible and reasonable)**

You may want to consider reasonable adjustments for periods of long-term illness that do not meet the current definition for disability.

ENSURING A DIVERSE WORKFORCE AT SENSE

Alison Bennett, HR Director at Sense and Sense International sets out her top tips based on her experience at Sense.

BACKGROUND ABOUT SENSE

Sense is here for everyone living with complex disabilities or who is deafblind. We are here to help people communicate and experience the world. We believe that no one, no matter how complex their disabilities, should be isolated, left out, or unable to fulfil their potential.

We employ 2,400 people and 60 of those work in our Supporter Engagement (SE) team made up of fundraising, communications, marketing and   public policy.

HOW ARE WE DOING IN RELATION TO THE DIVERSITY OF OUR WORKFORCE?

Here at Sense we work hard to ensure that we have a diverse workforce that represents society and the people we support.

- **8.4% of our SE team declare a disability against our overall organisation wide 11.1% and a fundraising sector average of 3%. So that means that 5 of the 60 people working in SE identify as disabled.**

- **73% of our SE workforce is female compared to 80% overall and 76% in the fundraising workforce**

- **However only 3% of SE staff declare a minority ethnicity compared to our organisation average of 11.1% and a fundraising average of 9%.**

You can see that we have got work to do on improving our representation of staff from some protected characteristic groups. But we are proud of our record on employing disabled people and are happy to share what we've learned. So here are my top three tips.

TOP TIPS FOR RECRUITING AND SUPPORTING DISABLED PEOPLE IN THE WORKPLACE

TOP TIP 1

Start from a place of equity. So often non-disabled recruiters think 'how can I adapt my practice so that it works for disabled people?'.

My top tip is to start from a different philosophical standpoint. Don't start with what you might need to adapt to encourage more disabled people to want to work for you. Start from auditing your practices so that they are led from an inclusive place.

Are all your recruitment materials accessible - can they be read by a screen reader? Are your film clips subtitled? Do your job role descriptors prejudice people from applying – saying 'must have GCSE English' isn't helpful to someone whose first language isn't English for whatever reason – whereas saying 'must be fluent in first language and with good written English skills' enables more people to apply for your role. Putting 'must have a valid driving licence' in your job role is no good to someone who is Blind whereas 'must be able to travel' makes it clear that you expect the successful candidate to get themselves to places other than your office.

TOP TIP 2

Make sure that the lived experience of disabled staff matches what you promise at interview. So often and with the best of intentions, we make promises that we don't live up to at interview. So keep an eye on your retention data – are more disabled than non-disabled people leaving your organisation?

Again audit your practice – how does social time happen in your team – is it inclusive? Are your role descriptors, policies, staff handbook, databases and more accessible? What can you do to make your meetings and catch-ups more inclusive? Is there anything you need to do to the environment to make it a more inclusive place to work? You could start by looking at the lighting, the lay out and the flooring.

TOP TIP 3

Get your Access to Work (ATW) ducks in a row. The Access to Work scheme exists to help fund practical support for disabled people at work. It can fund specialist equipment, adaptations and support workers. It can also provide help with getting to and from work.

It can be a lengthy process to navigate the ATW system as a disabled employee. Individuals can't make an application until they are in work, when they might already have started to incur expense. So my final top tip is to do everything you can to help your new recruit get their ATW assessment and contract up and running quickly. That might mean providing support to make calls to the assessment centre, complete application forms, provide time off for the assessment and help with paying invoices.

These top tips are based on my 30 years of working in the sector. I'd be happy to talk to anyone who wants to explore these tips further. You can find me on **Linkedin** or **@AlisonBSense**

PEOPLE WHO STAMMER – DOS AND DON'TS

This is an anonymised guide from a Chartered Institute of Fundraising Member.

1. Avoid the word 'fluently' as that could exclude people who stammer as well as people with English as another language. It's normally used as a short cut like 'excellent oral and written communication skills'.

2. Keep the person specification to those skills and experiences that are truly needed or desired for the role. People with disabilities, especially communication disabilities, may look at a JD and person specification and think it is not worth applying unless they meet all the points. Potential applicants may feel the need to prove themselves at a higher standard so that employers will look beyond perceived challenges.

3. Something to keep or add in: Resilience. Sector candidates know resilience is key to fundraising; people with disabilities and other challenges are often very resilient because they have to be.

4. Be mindful of language that may exclude quieter leaders. Terms like 'strong presentation /negotiation/influencing skills' and 'gravitas' are often interpreted as those who can speak the loudest and most forcefully. When quieter leaders can do those things too but in different ways.

5. Allow time on digital calls for candidates to answer, allow for time lags and screens freezing.

POSITIVE ACTION

WHAT IS POSITIVE ACTION?

Employers may want to actively address diversity through a formal process. The Equality Act 2010 and EU non-discrimination law permits voluntary, short-term positive action as an exceptional means to ensure full equality for people sharing a protected characteristic.

The Equality Act 2010, paragraph 511 of the explanatory notes, states that the Act:

"does not prohibit the use of positive action measures to alleviate disadvantage experienced by people who share a protected characteristic, reduce their under-representation in relation to particular activities, and meet their particular needs."

THE EQUALITY ACT 2010 CONTAINS SPECIFIC PROVISIONS:

- General positive action (s.158)
- Recruitment and promotion (s.159)
- Occupational requirement (schedule 9)

Positive action is NOT about disadvantaging those from another protected group. Positive Action should only be used if no other remedy is likely to address the inequality and disadvantage and should not be used to routinely favour candidates with a specific protected characteristic.

The ONLY exception to this is for disabled people where you can apply favourable treatment, such as guaranteed interviews for candidates meeting minimum criteria. Employment is not guaranteed and would still be based on merit.

You should keep positive action measures under review. They should be time-limited to be proportionate.

WHEN CAN YOU USE POSITIVE ACTION?

Analysis of your recruitment processes, application monitoring data and workforce data will tell you whether it is reasonable to think that some people:

- a. Experience disadvantage connected to a protected characteristic, or
- b. Have needs that are different from the needs oaf people who not that share that characteristic, or
- c. Have disproportionately low participation in an activity compared to those who do not share that protected characteristic.

WHAT ACTION CAN YOU TAKE?

If one of the above apply, you can then take any proportionate action to meet one or more of the three stated aims:

1. **Action to remedy disadvantage; or**
2. **Action to meet needs, or**
3. **Action to encourage participation in activities.**

ACTIONS COULD INCLUDE:

TARGETED ADVERTISING

Alongside your general recruitment advertising you could place your ad on sites aimed specifically at people from BAME communities, women, disabled people or the LGBTQI community. Advertise locally in print media, local job boards, local charities working with people with those protected characteristics and colleges and universities. Advertise on sites aimed at those returning to the workforce.

OPEN DAYS

You could hold a recruitment day to present your job opportunities and provide people with an informal chance to meet you and your team, find about the work you do and gain confidence that their application will be taken seriously. If you are a large, national organisation this could be used to increase recruitment in specific areas of the country where you need to improve the diversity of your organisation to better represent local demographics.

INTERNSHIPS, APPRENTICESHIPS AND TRAINING

You can offer placements, internships, apprenticeships, training and mentoring for a particular under-represented group to bring new people into the sector and to fundraising and to ensure that junior staff are given opportunities to develop to take on more senior roles.

GUARANTEED INTERVIEW SCHEME

Disability is the protected characteristic where it is always lawful to operate positive action. You can show your commitment to giving people with disabilities more opportunities, you can join the **Disability Confident Scheme** created by the UK Government.

One aspect of this programme is to guarantee that all disabled candidates who meet the minimum standards (60% of the key criteria) will be invited for an interview. The final decision will be made on merit. As the hiring manager you should ensure you have a clear intention to appoint on merit, to include disabled people, and not use the scheme as another tick-box exercise to gloss over poor recruitment practice.

REMOVING DEGREE REQUIREMENTS

Does your role really need a first or post-graduate degree?

APPOINTING

You can take protected characteristic into account when deciding who to appoint to a job – BUT only if candidates are equally qualified.

GENUINE OCCUPATIONAL REQUIREMENT

Some employment is exempt from the Equality Act 2010 as the roles are considered to have a Genuine Occupational Requirement. These include ministers of religion (priests, rabbis, imams, nuns and monks), actors and models.

There is no definitive list of what is a Genuine Occupational Requirement. It is up to the employer to decide whether there is suitable justification for a role being advertised with a specific occupational requirement.

This could be employing only women to work in a women's domestic abuse refuge or organisation as the service provision with the justification that the service users are seeking refuge from men. An organisation working with deaf people could have a GOR for someone with British Sign Language.

A community group working with refugees from a particular country may have a requirement for the postholder to speak in a particular language. Roles must be considered separately and each time the role is advertised.

INCOME INEQUALITY AND SOCIAL MOBILITY

Socio-economic background is not a protected characteristic but can affect people's life and employment chances. Recruiting for diversity should include welcome the experience gained from those with different backgrounds, which can add diversity of thought and approach. It may be harder to pin down someone's class, but class is still a factor in employment success.

GUIDE POINTS

- **Advertise roles without a requirement for a degree**

- **Listen to what the candidate says and not their accent**

- **Remove unpaid internships and expectations that new people can only join your workforce if they volunteer first**

- **If you have advertised a minimum salary do not lower this based on assumptions about someone's socio-economic background**

- **Salaries should be gender neutral**

The Social Mobility Foundation launched the **Department of Opportunities** in February 2020. They have created a recruitment toolkit for social mobility. There tips include recruitment outreach focused on social mobility "coldspot" areas or in schools, colleges and universities with higher proportions of socio-economic disadvantage. Reach people outside your normal networks with online FAQs, questions and answers or target your advertising for paid intern opportunities.

INCOME INEQUALITY AND SOCIAL MOBILITY

Dr Wanda Wyporska, FRSA, Executive Director at The Equality Trust and Visiting Research Fellow, University of York writes about the factors that lead to women experiencing income inequality.

The OECD, the World Bank and the CBI have all publicly expressed their concern about the effects of income inequality on society and on the economy. In February, the publication of the **Marmot Review: Ten Years On**, found that life expectancy was going backwards for the poorest, adding to the plethora of research demonstrating the damage that inequality does to all of us in society.

The **Equality Trust** was established over a decade ago, when Wilkinson and Pickett published **'The Spirit Level: Why more equal societies almost always do better'**. This international best-seller demonstrated that in countries with higher levels of inequality, you also see higher levels of socially determined issues, so higher levels of mental and physical ill health, drug and alcohol addiction, obesity, violent crime and incarceration and lower levels of educational attainment, social mobility and trust. It is a text that many charities will cite for their work challenging inequality.

> **"We must examine the social and cultural contexts and, crucially, what is so often missing, economic status and/or class."**

This is the essential background against which we must place any issue that falls under the banner of equality, diversity and inclusion. We must examine the social and cultural contexts and, crucially, what is so often missing, economic status and/

or class. Add in the layers of intersectionality of race, gender etc., and we realise the complicated nuances reveal a multiplicity of factors and experiences.

> **"Women are more likely to be employed in part-time roles, which tend to be lower paid."**

However, the gender pay and bonus gaps are seen in a rather more simplistic manner. The reporting regulations require companies with over 250 employees to report at quartiles, but without publishing any plan to address the gaps. And yet, as our research shows, there are FTSE companies that have reported gaps as high as over 60% and one company had a bonus gap of 100%. And yet, every company in the FTSE 100 says that it does not have an equal pay problem, and this is understandable, since that would be unlawful.

Given that the fiftieth anniversary of The Equal Pay Act 1970 falls on 29th May 2020, it would seem that this issue is one merely of historical value, surely, men and women are paid the same for the same work or work deemed to be of equal value? However, although this is not the same as the equal pay issue, we suspect that they are interconnected.

We can break this down into several factors. Women are more likely to be employed in part-time roles, which tend to be lower paid and this can additionally be influenced

by the high costs and availability of childcare. We still have a huge issue with occupational segregation, and the ways in which we value certain types of work. So women were traditionally encouraged into admin roles, while men in the fundraising sector disproportionally hold senior roles. Equal pay cases can be more complicated when we take into account work of 'equal value' where we have seen the work of 'dinner ladies' deemed to be 'equal' to that of 'bin men' for example.

As well as occupational segregation there are also problems with salaries and recruitment processes which the EHRC has highlighted. There are several common but risky practices, such as offering a starting salary range or the opportunity for recruits to negotiate their starting salary. This tends to disadvantage women, as they are less likely to negotiate a higher salary and they are more likely to have been on a lower salary previously.

"In too many organisations there is a culture of secrecy over pay and lack of transparency."

We also commonly hear employers say that they are benchmarking to the market rate. In fact, they are in danger of importing the existing gender pay gaps that riddle the labour market, and in doing so, create an equal pay problem. We also know that long overlapping salary bands can also contribute to a potential equal pay issue.

Salary transparency is also a key factor in identifying these issues. In too many organisations there is a culture of secrecy over pay and lack of transparency. These factors are easy to identify, so that as we approach the fiftieth anniversary of the passage of The Equal Pay Act, 1970, we can see some real action.
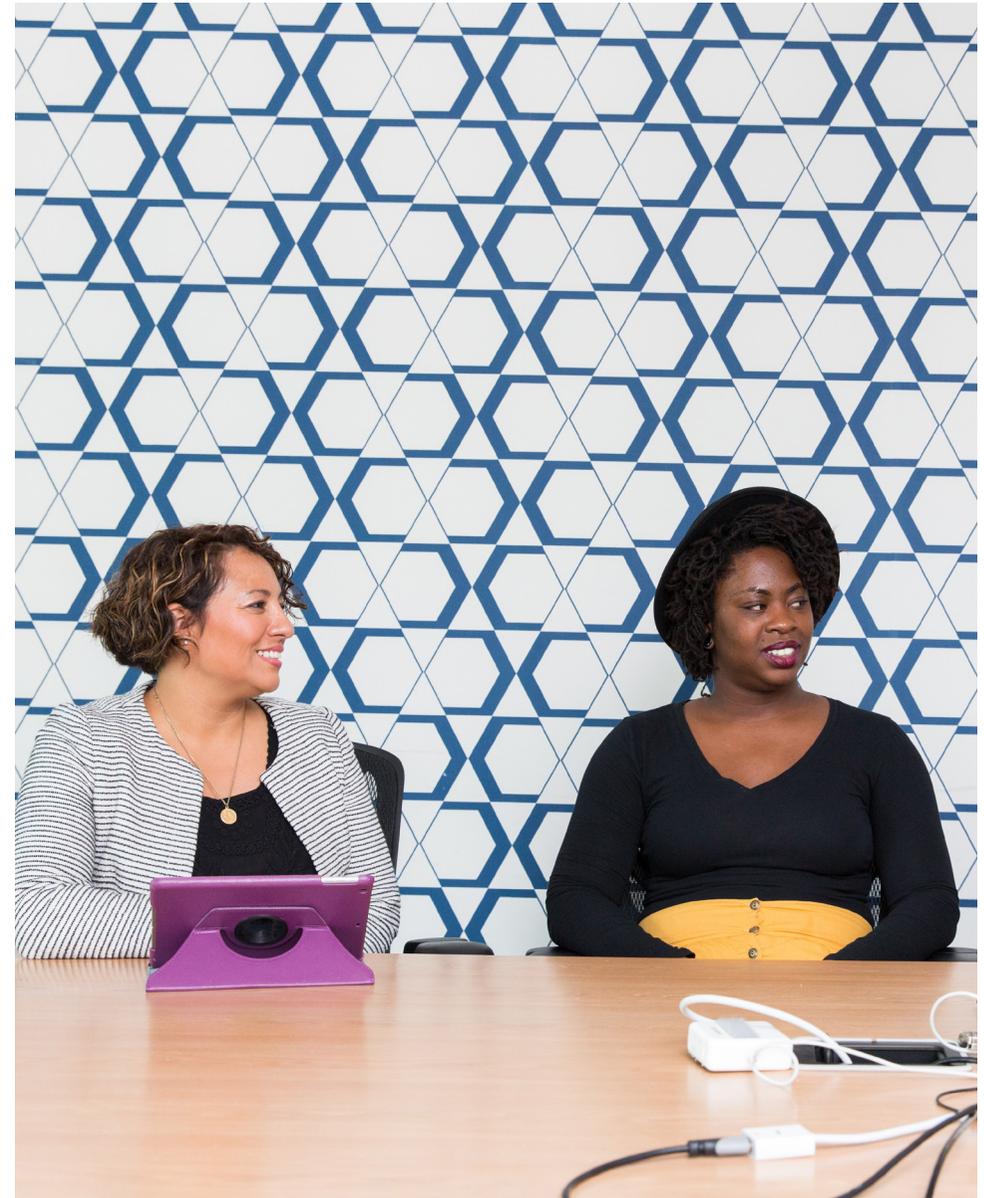
Peter Babadu, Head of Evidence at the Youth Endowment Fund reflects on barriers for BAME and working class candidates

Having spent much of the last decade working with funders as an external consultant and evaluator to improve how they use evidence, I decided to move towards doing this in-house. I began my career in the corporate sector but found that purpose was a necessary motivator for me but often absent from my day-to-day work.

I do not award funds but I look at what evidence we have to inform funding decisions. It's a role that I think should exist in more funders, not just in what works centres like the YEF.

Recruiting managers should consider looking for a fork in a room of spoons. I think the assumptions about what works can be very narrowing. For example, people who show good attention to detail but bring less existing relationships could still make for great fundraisers as more and more funders look to make evidence-informed decisions

Requirements for experience are often a barrier as the early experience is often unpaid and available via relationships. This can be particularly difficult for young people from BAME and working class backgrounds. Their potential to add value to your organisation is dismissed before it is given a chance as they can't afford to work unpaid and don't have the relationships to get the word-of-mouth opportunities.

I see young people of colour not getting the opportunities or making the progress they should. I think people should have diversity in their career options and not disregard getting groundings in areas with better track records of diversity.

"I've found the charity sector more discriminatory, often in subtle ways, than I experienced during my corporate career."

I've found the charity sector more discriminatory, often in subtle ways, than I experienced during my corporate career. That said, things continue to change and we need pioneers to support each other in making this sector more accessible.

EMPLOYING MIGRANTS

You may want to actively recruit migrants to bring skills and experience to your organisation that help you deliver your mission and goals, including reaching migrant communities for donations. You may be wary of interviewing a migrant for your fundraising role because you do not understand what you can and can't do. Many migrants have the status and documents to prove eligibility to work.

This guide provides a few tips on recruiting migrants to unlock the potential of migrants to fundraising roles.

GUIDE POINTS

ACTIVELY ENCOURAGING MIGRANT APPLICANTS:

1. Use your sector networks to identify migrant and refugee charities and not for profit organisations to meet migrants interested in fundraising

2. Look at local organisations with employment brokerage for migrants

3. Advertise your online job on international platforms; be clear where the role is based

4. Ensure person specifications include an option for non-UK qualifications and experience

5. Do not rule out someone as 'overqualified' with non-UK qualifications. The qualification may not be an equivalent to a UK qualification or they may be seeking a change of career

6. Ensure the hiring manager and panel understand the current legal requirement for employing migrants

7. Reframe your thinking on gaps in employment – migrants may have spent time travelling or have had unavoidable gaps in employment as refugees

GENERAL THINGS TO CONSIDER:

- Repeat or rephrase questions, especially if interviews are taking place remotely and by phone

- Do not use colloquialisms and jargon

- Explain the workplace culture and the recruitment process being used

- Overseas references can be contacted by email, through LinkedIn and other networking sites

- Involve migrant employees already in your organisation – use their experience to improve the process and experience for migrant applications

- Migrants may have very good written English with poor spoken English, or vice versa, and need time to develop their spoken or written English. Consider the applicant's strengths and contribution overall

EMPLOYMENT CHECKS:

- Do not assume that someone does not have the right to work in the UK based on their colour, nationality, ethnic or national origins, accent or length of time in UK

- Treat all applicants the same and ask all people you are considering employing to provide you with eligibility documents:

- Obtain the original identity documents listed on the current Home Office guidance. List A tells you which documents are acceptable. List B provides the two groups of time limited documents

- Check that the information is valid with the potential employee present

- Copy the document(s) and store securely and in compliance with GDPR and your data policy.

- Record the date you made the check and copied the document(s)

- It is your responsibility to check that the documents are genuine, belong to the person you are considering employing and are in date and not due to expire during the employment period. You may face a civil penalty if you do not carry out the checks because you have assumed a right to work.

RECRUITMENT DURING AND AFTER THE CORONAVIRUS CRISIS

We all have new perspectives about what our work is, what it needs now and we're buzzing with ideas and worries about what the future opportunities and threats will be. We've had to learn a whole new language for HR (furlough) and working from home (Zoom or Teams, anyone?). Some organisations may have temporarily halted recruitment but others have continued.

Falling back into old ways of working after the crisis is over may be tempting but you will lose the opportunity to make changes to your equality, diversity and inclusion intentions on recruitment and not entrench existing inequalities. You will have to recruit again and the Covid-19 crisis provides you with the knowledge, experience and skills to do it differently.

GUIDE POINTS:

1. Review your job descriptions and person specifications. It sounds simple but you may now want more or different digital competencies, for instance.

2. Consider which roles can work from home, even when the office re-opens. This will allow you to recruit from a wider geographical area, wider range of disabled people and those with caring responsibilities.

3. Review your emergency working from home procedures to ensure health and safety, insurance, expenses, equipment and furniture, cyber-security and confidentiality is maintained.

4. Do not assume everyone can or wants to work from home permanently. What has been possible in a crisis may have placed an additional stress on colleagues – not everyone has the luxury of space to create a dedicated home office.

5. How will you ensure your remote working existing colleagues and new hires are not disengaged from office/physical workspace colleagues?

6. What did you do in the crisis?

7. You may be tempted to ask candidates to tell you what they did in the crisis, think carefully what you want to know and why – does it add to your understanding of their competence?

8. Be aware of potential bias towards candidates who worked through, volunteered, took up training courses – not everyone will have had the choice, time or capacity.

9. Candidates who were not furloughed may have been given additional responsibilities and will naturally want to present this. These opportunities may not have been spread evenly across all equality groups.

10. Be sensitive to candidates who were furloughed: it may not have been their choice; they may have been shielding; they may have had caring responsibilities.

11. Some candidates will have lost friends of families to Covid-19 and may not want to talk about this time.

12. Some people will have lost their jobs, or have been in the group of new starters not eligible for furlough.

13. Candidates will also want to know what your organisation did. When they search you, what comes up? Have you been the best you could have been in supporting your workforce?

DIGITAL IS WHERE IT'S AT

- You will have already advertised roles using digital media – review this and see how you can improve how you present yourself.

- Now that you're familiar with tech for meetings you can use this for interviews – choose your tech and write some guide notes for candidates so that they can prepare to use your choice of tech prior to the interview.

- Prepare for the interview by dressing as you would for a face to face interview, ensure the lighting is good and the sound is working, that you have a quiet, secure space and that the internet connection is working.

- Don't forget EDI: will the candidate need to use a sign language interpreter? is the information in text reader formats? Just as you would for face to face, find out what the candidate needs.

- Log in ahead of the interview so that the candidate is not left in the 'lobby' too long.

- If you are using the same link for all candidates make sure you allow enough time between interviews so that candidates don't meet, as you would for a face to face interview. Unlike a face to face interview candidates might come into the 'room' early; it would be better to create new links for each candidate.

- Make sure you have a number to call or text candidates in case of technical problems and ensure they have a way of contacting you.

- Your tech choice may allow you to record the interview. You should inform candidates if you are planning to record and how you will be using the recording. It gives you the opportunity to carry out a one to one shorter, initial interview that other panel members can review to decide the final candidates to invite for a fuller interview.

- Candidates can present through sharing their screen but this is easier on a computer/laptop than on a phone. Check what candidates will be using and adjust as necessary, e.g. sending the presentation ahead of the interview for you to share on the screen.

- The panel chair should invite panel members to ask their questions and agree signals to ask follow-up questions or seek clarification.

- Remain present and attentive throughout the interview, but muted if you're not speaking.

- You may decide to never go back to the old ways.

RECRUITING TO BE LIKE THE FUNDER

Researching information for this guide we discovered that some people have a bias for recruiting people who resemble their major funders. James Fitzpatrick, CEO of the Joseph Levy Foundation (writing in a personal capacity) explains why this is short-sighted.

WE WANT MIRRORS. WE NEED WINDOWS.

There's a renewed focus on Diversity, Equity and Inclusion (DEI) in the charity and not-for-profit sector at the moment – and the Chartered Institute of Fundraising has been one of the infrastructure bodies that has done most to take action on this so far through its Change Collective.

Other membership organisations and infrastructure bodies now need to follow that example and do more to support their members to make their practice and their organisations – and our sector as a whole – truly inclusive and equitable in who we are, how we work and the outcomes we achieve.

As someone who has worked and volunteered in the grantmaking trust and foundation sector for the past 20 years, I have been embarrassed and frustrated by the slowness of my sector to engage with the issue of DEI. And the trust and foundation sector has a particularly big problem with lack of diversity.

As research commissioned by the Association of Charitable Foundations (ACF) in 2018 showed, compared to other charities, foundation boards were disproportionately homogeneous, being 99% white, two

thirds male and almost 60% over the age of 65[1].

There is no external pressure or competitive advantage for most (non-fundraising) trusts and foundations to become more diverse.

Few of us have external stakeholders to be a source of influence for change and the communities and organisations we seek to support are unlikely to risk biting the hand that might feed them. And the organisations seeking our funds are unlikely to be able to "take their business elsewhere".

The fact that the trust and foundation sector is so un-diverse refutes our professed commitment to social justice and equality. Or at least it demonstrates that we're committed to equality just so long as it's limited to what we expect our grantees to demonstrate, and we're committed to social justice just so long as it's something we only expect others to enact.

Fozia Irfan (@Fozia_Irfan - Chief Executive of Luton and Bedfordshire Community Foundation) coined the term 'coercive isomorphism' – where funders force grantseekers to behave in certain ways in order to get funding. This is a conscious and unconscious process – on both sides of the funding relationship.

---

[1] acf.org.uk/downloads/member-briefings/ACF_CASS_trusteedata_2018.pdf

Change is beginning to happen in some trusts and foundations – e.g. Blagrave Trust, a youth focussed funder, has recently taken the decision to replace its entire trustee board with young people[2].

There are other changes emerging – e.g. where some trusts and foundations are seeking to share or shift power through participatory grantmaking (e.g. Rosa[3]) or are moving away from grantmaking towards social investment[4]. But in my experience the majority of foundations remain wedded to traditional policies and practices – seeing grants as the main means to achieve their charitable objects.

ACF is currently running its Stronger Foundations project that aims to help grantmaking foundations identify and pursue excellent practice. It covers 6 strands – including 'Diversity, Equity and Inclusion' and each strand will have a report that identifies "stronger foundation practice" under that theme. The 'Funding Practices' strand is due to report in the summer of 2020, and one of the issues it has been examining is the need to move away from a purely transactional relationship between funders and fundseeking organisations.[5]

Many on both sides of the funder/fundseeker relationship would agree that the relationship shouldn't be transactional - it should be relationship based. But the focus of the relationship should be common cause - not common appearance/accent/culture, etc.

In forming relationships, both funder and fundseeker potentially confuse signs/indicators of familiarity (looking, sounding, saying things like us/me) with a shared affinity with the cause or with competence. And they potentially confuse similarity with trust (worthiness).

And as Vu Le's (**@NonProfitAF**) post shows, relationship-based fundraising is fraught with problems: *"Unfortunately, our reliance on relationships is also problematic, as it often creates and enhances inequity and thus undermines many of the problems we as a sector are trying to address."* [6]

"Unfortunately, our reliance on relationships is also problematic, as it often creates and enhances inequity and thus undermines many of the problems we as a sector are trying to address."

How much are we as funders used to speaking with other white people as "peers" (e.g. she must be the Head of the Philanthropy Team) and unconsciously categorise people of colour as non-peers/lower status (e.g. she must be the Philanthropy Team's Administrator)?

This is backed up by research from the US: "In line with this data, Building Movement Project's "Nonprofit Executives and the Racial Leadership Gap: A Race to Lead Brief" found that executive directors of color were more likely to report challenges developing relationships with funding sources." [7]

[2] blagravetrust.org/wp-content/uploads/2019/02/Reducing-Social-Distance.pdf   [3] rosauk.org/wp-content/uploads/2019/04/Alliance-Beneficiaries-in-charge-Jan-2019-1-1.pdf

[4] diversityforum.org.uk   [5] acf.org.uk/downloads/publications/Impact_and_Learning_Report_FINAL.pdf   [6] nonprofitaf.com/2020/02/the-problem-with-everything-being-all-about-relationships/#more-6414

[7] cep.org/reflecting-on-leadership-diversity-in-todays-nonprofit-sector

As funders, we shouldn't be looking for or expecting "mirrors" [see footnote] in the organisations we choose to support. Organisations that reflect ourselves – employing people who look and sound like us, drawn from our social background and class – comforting us and giving us potentially false assurance (however unconsciously) that we can entrust our funds to that organisation and that we'll have a nice, straightforward time throughout the funding relationship.

Instead of mirrors we should be looking for "windows" that show us things we wouldn't otherwise see or understand: people with lived experience and expertise. Organisations which are "of" rather than "for" the communities they seek to serve.

"...employing people who look and sound like us, drawn from our social background and class – comforting us and giving us potentially false assurance..."

With the urgency of mission (or survival) I understand why fundseeking organisations might be tempted to employ fundraisers who, they believe, will be more effective because they will be the mirrors that foundation staff and trustees want to see. But the *#MeToo* aspects of this "recruiting for aesthetics" are obvious.

In addition, fundseeking organisations may believe that people from a certain background, or with a certain set of technical competences (e.g. people with a degree who know how to write a "good" bid) will be more effective fundraisers when it comes to raising money from certain kinds of funders. Yet the arguments for diversity in fundraising leading to more opportunities to engage with "non-traditional" donors

(or at least donors who don't currently give to mainstream charities but might give in other ways e.g. for religious or cultural reasons), and potentially generating new fundraising ideas, are now well known.

"As funders, we have to be on our guard about gratitude - expecting it, feeling warm and snuggly when we receive it..."

And some funders are not immune from the "recruiting for similarity" risk. Those foundations which raise money through public appeals, and community foundations which choose to prioritise growing their endowment or funds under management, also need to be mindful of how that imperative might affect who they employ and who they appoint to their boards (e.g. to be "acceptable" to local philanthropists, businesses, etc).

Whether or not we get to see a mirror or a window, as funders we risk focussing on the wrong thing anyway – which is the frame. "Is the bid well-written?" "Has the organisation been suitably grateful in their monitoring report?" It's not our money (even if a living donor remains involved it stopped being their money as soon as they paid it over to the foundation).

As funders, we have to be on our guard about gratitude - expecting it, feeling warm and snuggly when we receive it, etc.

We should stop expecting (however unconsciously) to be stroked by applicants or grantees. And please stop calling us (trusts and foundations) "donors".

It feeds the "gracious beneficence" mindset and culture that continues to pervade our

sense of ourselves and our systems and procedures. And please use **@Grant_AdvisorUK** to rate us anonymously and call out the bad funding practice you see and experience.

As well as listening to direct feedback – including from *#CharitySoWhite*, *#NonGraduatesWelcome* and other movements holding us to account – we funders need to develop greater self-awareness - about ourselves as individuals (our preferences, biases, etc), and about our organisations, how we are perceived, our processes, the norms and culture of our sector, etc. In particular, we need to develop our humility skills. In most cases, even for "Funder Plus" funders, we're just the money - and we can't achieve our charitable objects without the organisations we distribute charitable funds to.

> *"…even for "Funder Plus" funders, we're just the money – and we can't achieve our charitable objects without the organisations we distribute charitable funds to."*

Funders and fundseekers are part of a co-dependent system. The Chartered Institute of Fundraising and the Association of Charitable Foundations need to work much more collaboratively to change how that system works – beginning with ensuring that the practice of funders expecting fundraisers to be white, middle class (and generally female and young) – and fundseeking organisations colluding with that – is ended.

But that's just the start.

All our sector's infrastructure bodies have a responsibility to change what they are doing – individually and collectively – to shift the culture and norms of our sector so that diversity, equity and inclusion become core operating principles in everything we do by default.

By my count, there are between 15 and 20 key organisations that represent or support a significant part, if not the majority, of the charity and not-for-profit sector. That is a small group of organisations and a small group of leaders. There is no good reason why such a small group of people cannot coordinate their efforts to significantly change how our sector delivers on diversity, equity and inclusion in a small number of years rather than a small number of generations.

Footnote:

In 1988 Emily Style of The National SEED Project used the idea of "mirrors" and "windows" to describe the need for people to see others (through windows) not just themselves (in mirrors) in order to form a complete picture of the world and their place in it: **nationalseedproject.org/Key-SEED-Texts/curriculum-as-window-and-mirror**

The Chartered Institute of Fundraising is the professional membership body for UK fundraising. We support fundraisers through leadership and representation; best practice and compliance; education and networking; and we champion and promote fundraising as a career choice. We have over 640 organisational members who raise more than £10 billion in income for good causes every year, and over 6,000 individual members.

For more information, please visit:
www.institute-of-fundraising.org.uk

CHANGE COLLECTIVE

Institute of Fundraising