

## Jewish Family & Career Services: CEO Candidate Meeting

Your Name (optional) \_\_\_\_\_

Candidate's Name \_\_\_\_\_

Please rank your assessment of the candidate based on the following skills:

**Self-Starter:** Goal driven and possesses a high degree of motivation and energy; record of productivity.

Poor                  Weak                  Good                  Very Good                  Excellent

**Passion for JFCS Mission:** They are “driven” by the importance of our mission, vision, and values.

Poor                  Weak                  Good                  Very Good                  Excellent

**Ability to Accept and Motivate Others:** Attract and inspire others, including volunteer and staff; open to and accept many different types of people.

Poor                  Weak                  Good                  Very Good                  Excellent

**Deals Well with Conflict:** Handles adversity with grace; not take criticism personally; keep a sense of perspective.

Poor                  Weak                  Good                  Very Good                  Excellent

**Thinks Strategically but Implements Tactically:** Sees the big picture but able to implement plans effectively to move JFCS forward.

Poor                  Weak                  Good                  Very Good                  Excellent

**Financial Acumen:** Understands finances; knows how to budget; recognizes both financial opportunities and threats.

Poor                  Weak                  Good                  Very Good                  Excellent

**Fundraising Skills:** Has knowledge and experience in fundraising techniques, including individual giving, major gifts, grants, government, foundations.

Poor                  Weak                  Good                  Very Good                  Excellent

**Ability to listen:** Knows how to actively receive input and listen to other viewpoints and collaborate with others.

Poor                  Weak                  Good                  Very Good                  Excellent

**Sound Judgment:** Has the ability to sift through alternatives, deliberate, and then arrive at a sound decision.

Poor                  Weak                  Good                  Very Good                  Excellent

**Persistence:** Not let obstacles stand in the way and can persevere through difficult times for the organization.

Poor                  Weak                  Good                  Very Good                  Excellent

What is your impression of the candidate's ability to lead JFCS in partnership with the Board?



## **Messages for Staff and Board re: CEO Meet/Greet**

### **Draft Staff Message:**

#### ***Sent on behalf of the JFCS CEO Search Committee***

After reviewing more than 60 resumes and applicants for the CEO role, we narrowed the pool down to eight candidates that we had further phone calls and engagement with and then down to four candidates for Zoom interviews last week. We have now narrowed it down to two finalists that will be meeting in-person early next week for conversations with stakeholders.

You, the professional staff of JFCS, are a critical stakeholder group that we would like to spend some time with each candidate, if you're available. Here is the Staff Meet and Greet schedule for next week:

Monday, July 26, 1:30 – 3 pm at JFCS

Tuesday, July 27, 1:30 – 3 pm at JFCS

You will receive a calendar invite – please confirm so we can plan for seating accordingly. We will share more details about each candidate, including their resumes, closer to the meetings and appreciate your confidentiality during this process. Both of these candidates are currently employed with other organizations. Ensuring we can have candidates confidentially meet and engage in conversations with the critical stakeholders of JFCS is an important part of this process and will help us as a search committee make our final decision. We will provide a survey for you to share your valuable feedback after your conversations with each candidate.

We're hopeful you can attend these sessions and we do understand that not everyone will be able to make it work with their schedule. Thank you for your engagement in this important process of finding the right next leader for JFCS.

-CEO Search Committee

Linda Shapiro and Karen Sherman, Co-Chairs

Marc Charnas, Michael Gold, Mike Fine and Robin Stratton

### **Draft Board Message:**

#### ***Sent on behalf of the JFCS CEO Search Committee***

After reviewing more than 60 resumes and applicants for the CEO role, we narrowed the pool down to eight candidates that we had further phone calls and engagement with and then down to four candidates for Zoom interviews last week. We have now narrowed it down to two finalists that will be meeting in-person early next week for conversations with stakeholders.

You, JFCS Board of Directors, are a critical stakeholder group that we would like to spend some time with each candidate, if you're available. Here is the Board Meet/Greet schedule for next week:

Monday, July 26, 11 am – 1 pm at JFCS – lunch provided

Tuesday, July 27, 11 am – 1 pm at JFCS – lunch provided

We will send calendar invites for each day – please confirm your attendance so we can plan for lunch and seating arrangements. We will share more details about each candidate, including their resumes, closer to the meetings and appreciate your confidentiality during this process. Both of these candidates are currently employed with other organizations. Ensuring we can have candidates confidentially meet and engage in conversations with the critical stakeholders of JFCS is an important part of this process and will help us as a search committee make our final decision. We will provide a survey for you to share your valuable feedback after your conversations with each candidate.

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Your Name (optional) \_\_\_\_\_

Candidate's Name \_\_\_\_\_



Please rank your assessment of the candidate based on the following skills:

	Poor	Weak	Good	Very Good	Excellent
1. Clear Communication					
2. Collaboration					
3. Open-mindedness					
4. Approachability					
5. Transparency					
6. Growth mindset					
7. Ethics & Values					
8. Decisiveness					
9. Creativity & Innovation					
10. Fearlessness					

What is your overall impression of the candidate's ability to lead JFCS?

**JFCS Louisville – CEO Search  
Zoom Interview Candidate Assessment**

**Candidate Name:**

**Is this candidate “CEO ready” from the perspective of:**

- |   |     |
|---|-----|
| <input type="radio"/> Experience (leadership, management of people, etc.)                         | Y/N |
| <input type="radio"/> Collaborative – expresses a mindset of collaboration in and outside of team | Y/N |
| <input type="radio"/> Mission driven, mission focused   | Y/N |
| <input type="radio"/> Ability to create/foster a culture of creativity                            | Y/N |
| <input type="radio"/> Being a relationship builder  | Y/N |
| <input type="radio"/> Coaching and mentoring for results  | Y/N |

**Would this person be able to lead without a CFO and then lead the recruiting for the right financial leader?**

**Would this person be able to engage with our current donor base and cultivate new relationships?**

**If you were the Board Chair of JFCS, would you want to work regularly and frequently with this person?**

**What concerns do you have about this person if any?**

**Is this person a “top candidate” to proceed to in-person interviews? (Goal is to narrow down to 2 or 3, max candidates for in-person).**

**Any other comments, notes.**

## JFCS Louisville – CEO Search Zoom Interview Questions

Questions tied to position description and organization's priorities.

Seek responses from specific examples from real-life situations.

- If no experience in that situation, ask how the candidate would handle the situation.

Responses should be concise for providing any particular assumptions, context, situation for opportunity/challenge, implementation, and result (quantitative/qualitative); but long enough to provide sufficient insight into such example attributes of each respective candidate's:

- \* experience \* maturity \* way of thinking \* strategic perspectives \* operational implementation, \* results-orientation \* coaching/mentoring \* leading \* communicating \* respecting individual dignity \* hands-on vs. manage balance \* leading through change \* culture of creativity \* community engagement \* mission driven, mission focused \* engaging with and working with Board of Directors and Board Chair

**Note: Italicized are comments and insights to extract**

### Questions

1. **LINDA** What aspects of the JFCS job description and opportunity excite you the most? *(May also imply what responsibilities are of least interest but how they can get comfortable with them).*
2. **MARC** What values are most important to you and why? How have you demonstrated them in your life and work?
3. **MICHAEL/ KAREN (depending on attendance)** How would you approach proactively getting up to speed and leading during the first 6-12 months of your JFCS tenure? What are your expectations? *(get sense of how much they drive ideas; listen and learn; have a perspective on culture, resources needed, etc.)*
4. **ROBIN** Describe one or more situations where your (a) colleagues/employees and/or (b) volunteer leaders felt one way in regards to handling a matter and you felt differently. What did you do to convince others in your direction or to a win-win result?
5. **MIKE/MARC (depending on attendance)** How have you addressed situations when an employee was not meeting performance expectations? AND/OR How have you led/excited your team toward a particular goal and work as a team?  
*(Insight into approaches coaching/mentoring/training; matching skills, abilities, and interests; dealing with cultural/demographic differences; addressing sensitive situations).*
6. **LINDA** How have you led your team in enhancing operational efficiency? How did you determine the root cause of a problem, what was the plan to resolve it and what was the result?

7. **MARC/MICHAEL (depending on attendance)** What examples can you provide on how you have led your team in defining, providing, and measuring superior service? *(Service stakeholders are broad and may be defined: clients, donors, board members, volunteers, collaborators. Also, confirming attention to detail while not losing the big picture).*
  
8. **MARC** Describe what impact you have had on driving revenues in your organizations: How have you positively impacted earned revenue through program development, expansion, collaborations, and/or client usage & pricing? What was the result and why was it a good idea?
  
9. **ROBIN** Share a situation on how you prepared for (e.g., understand donor's motivations and financial capabilities) and solicited a donor to meet the needs of the organization. What was successful and what didn't work?
  
10. **MIKE/KAREN (depending on attendance)** What questions do you have? What do you understand the top priorities/challenges to be? *(Assess what is important to candidates; also strategic vs. operational).*