

## Hiring a CFO: Interview Guide

The key to success in any hiring process is finding the candidate with the right skills, interests, and disposition for your organization's needs, culture, and leadership. The candidate interview is an essential part of determining whether a candidate is a good fit with your organization's CFO position. We have developed the following interview guide based on the Bridgestar talent team's deep experience with recruiting and placing nonprofit CFOs. This interview guide provides a broad overview of the fundamental competency areas in which a CFO candidate should be assessed, the topics to cover when asking questions, and key points to look for in candidate answers.

### Functional Experience

#### Competency Area: Strategy

Ask Questions About:

- Key strategic initiatives candidate has worked on
- How/whether candidate has simplified a process within an organization
- How candidate has solved a finance/accounting-related problem

What to Look for in Candidate Answers:

- Appropriate examples of key strategic projects, details about candidate's role in those projects
- Evidence that candidate can streamline processes, help organizations be more efficient
- Evidence that candidate has a strategic perspective on problem-solving (rather than just a technical perspective)

#### Competency Area: Partnership with Senior Leadership

Ask Questions About:

- Candidate's relationships with leadership of prior employer organizations
- Example when candidate problem-solved in collaboration with senior leadership
- Candidate's greatest professional contribution to an employer

#### Boston

535 Boylston St., 10th Floor  
Boston, MA 02116  
P 617 572-2833  
F 617 572-2834

#### New York

112 West 34th St., Suite 1510  
New York, NY 10120  
P 646 562-8900  
F 646 562-8901

#### San Francisco

465 California St., 11th Floor  
San Francisco, CA 94104  
P 415 627-1100  
F 415 627-4575

What to Look for in Candidate Answers:

- How candidate relates to senior leaders, ability to act as partner
- Clarity in how candidate collaborates with senior leadership in problem-solving
- “We” rather than “I” language in description of greatest contribution

### **Competency Area: Financial and Operational Management**

Ask Questions About:

- Candidate’s experience working in a cash-constrained environment
- The areas of financial and operational management that candidate is most and least comfortable and experienced with
- Candidate’s technical expertise with overseeing or configuring financial systems

What to Look for in Candidate Answers:

- Evidence that candidate can work in often cash-constrained nonprofit environment
- Checklist assessment of what financial and operational management skills candidate does and doesn’t possess
- Whether candidate knows how to configure or can knowledgeably oversee financial systems

### **Competency Area: Finance/ Technical Abilities**

Ask Questions About:

- The toughest finance project candidate has worked on (cash flow, cost containment, budgeting, cost allocation, other)
- Candidate’s approach to working with accounts receivable (A/R) and accounts payable (A/P)

What to Look for in Candidate Answers:

- An appropriately “tough” example and clear articulation of how candidate’s finance knowledge helped solve the problem
- Technical knowledge of A/R and A/P

## **Competency Area: Leadership**

Ask Questions About:

- Candidate's relationships and management style with peer colleagues and direct reports
- Example when candidate problem-solved in collaboration with peer colleagues and direct reports
- Candidate's approach to recruiting, hiring, coaching finance team members

What to Look for in Candidate Answers:

- Candidate's comfort level with decision-making process within organization
- Positive problem-solving skills, collaborative approach to working with peer colleagues and direct reports
- Fit with organization's approach to recruiting, hiring, coaching

## **Competency Area: General Breadth of Experience**

Ask Questions About:

- Shortcomings in candidate's experience compared to job description
- Candidate's career progression

What to Look for in Candidate Answers:

- Qualifications that may not have come out in resume and cover letter; also candidate's humility, self-awareness of gaps, and ability to recognize opportunities for growth
- Logical progression, no unexplained gaps

## **Personal Attributes**

### **Competency Area: Drive for Excellence**

Ask Questions About:

- How candidate deals with high expectations and time pressure

What to Look for in Candidate Answers:

- Ability to prioritize and a commitment to excellence despite pressure

### **Competency Area: Collaborative and Interpersonal Skills**

Ask Questions About:

- Candidate's ideal decision-making environment
- Candidate's ideal relationship with boss, colleagues, and direct report(s)
- Example of an instance in which candidate faced interpersonal conflict

What to Look for in Candidate Answers:

- Fit between candidate's ideal decision-making environment and that of organization
- Fit between candidate's ideal relationship structures and existing personalities/styles
- Positive approaches to interpersonal conflict

### **Competency Area: Commitment to Vision & Mission**

Ask Questions About:

- Why candidate is passionate about organization's mission

What to Look for in Candidate Answers:

- Clearly articulated passion for and understanding of specific mission of organization

### **Competency Area: Core Values**

Ask Questions About:

- Candidate's experience with an unethical action or situation and how s/he handled it

What to Look for in Candidate Answers:

- Clarity about what is and isn't ethical behavior, courage to speak and act appropriately

*Editor's note: this interview guide draws on several other pieces also available on the Bridgestar website that cover in more depth some of the topics discussed here. They are "[The Nonprofit Chief Financial Officer](#)," "[Finding the Right CFO for Your Organization](#)," and "[Frequently Asked Questions: Hiring a CFO](#)".*

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