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This resource contains two items: [a blank worksheet](#), and one sample for a [policy director role](#).

Figuring Out the Role – Worksheet

Being crystal clear on the role is key to recruiting top talent. Use this worksheet to develop the competencies a top candidate must have. This list can also be translated into a job description.

1. Define the role

I am hiring for the following position: _____

The 3-5 major areas of responsibility (i.e., the most important, time-consuming “buckets of work”) include:

-
-
-

Specific things this person would be doing now:

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2. List your must-haves, nice-to-haves, and not-haves

What does it take to do the role well? Clarity here is essential. Think about the skills, knowledge, and qualities this person needs to have. Distinguish between “underlying” traits (such as critical thinking or work ethic) and “teachable traits” (such as how to use a particular software program). Separate your list into must-haves (see [examples](#)), nice-to-haves, and not-haves. Note: not-haves aren’t negative qualities or “deal-breakers,” but rather skills that aren’t essential to this role, so you don’t need to test for them.

Must-haves <i>Skills and qualities you will not compromise on and must test for</i>	Nice-to-haves <i>Skills and qualities that are a plus, but not a requirement</i>	Not-haves <i>Skills and qualities that you will not actively screen for</i>
<ul style="list-style-type: none"> • • • 	<ul style="list-style-type: none"> • • • 	<ul style="list-style-type: none"> • • •

Pause here and do a bias check. Did you list any must-haves that might exclude great candidates? Examine your [PTRs](#). Focus on the competencies required to do the role.

3. Draft a one sentence profile of your ideal candidate:

Figuring Out the Role – Sample

State Health Care Now: State Policy Director

Areas of Responsibility

- Build and maintain relationships with key actors in state—policy makers, NGOs, industry execs, leading experts on the issue, and constituents
- Lead implementation of state advocacy agenda—current activities include three major programs and one annual conference
- Supervise 3 state-based project staff, 2-4 consultants, and 10-20 volunteers
- Monitor legislative proposals and trends
- Serve as a member of the organization’s leadership team

Specific things this person would be doing now

- Call Joan at Citizens United and convince her ED should speak at their state conference
- Manage development of c4 voter guide—get input from national team members and from allies; oversee communications team process to make sure on track
- Let lobbyist know we’re not renewing contract, without burning bridges
- Sit in on health care caucus retreat and give input on legislative strategy

Must-haves	Nice-to-haves	Not-haves
<ul style="list-style-type: none"> • Relationship-building: able to connect with individuals and build alliances among wide range of players in the state. Works well with diverse or marginalized populations; can bring in allies across diverse communities • Results-orientation: has a track record of achievement and producing results (rather than getting immersed in process), perseveres despite obstacles • Project management skills: stays on top of multiple projects, plans backwards, anticipates obstacles, identifies and involves stakeholders appropriately, uses resources wisely • Commitment to social justice & racial equity: recognizes role of race, gender, and other identities in shaping health disparities, is driven to improve conditions, and proactively learns re: race, equity, and identity 	<ul style="list-style-type: none"> • Issue familiarity: prior knowledge of or experience in healthcare policy • Legislative experience: this would be good to have, but we’ve seen that we can teach the general approach • Writing: should be good enough to send emails on our behalf, but doesn’t need to be stellar—policy papers and testimony will be drafted by national team; will work with communications department on reports and media/outreach products • Strategic thinking: will be an important helper in spotting opportunities and thinking of smart ways to move our issue forward, but ED will drive Policy Director’s work in setting strategic direction 	<ul style="list-style-type: none"> • Public speaking/charisma: we will use ED and/or allies for most major public appearances • Research skills: should become able to monitor trends and be fluent in healthcare policy and related issues, but can rely on research and reports from our analysts and outside sources

One-sentence profile

Relentless, results-oriented person who excels at building relationships and at managing complicated projects to advance equitable public health legislation.