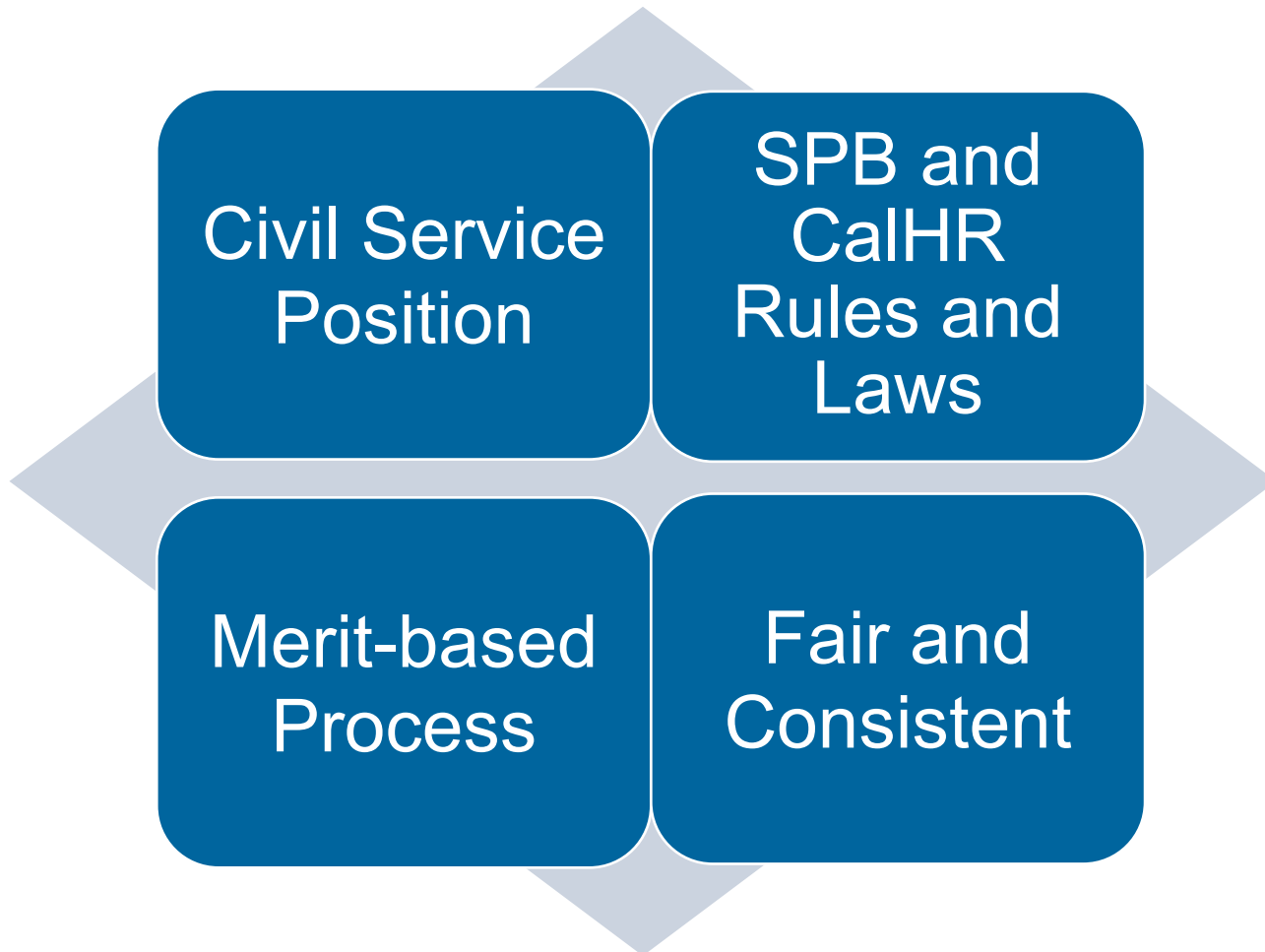


Chief Investment Officer Interviews: Civil Service Process and Roles

Michelle Tucker, Chief
Human Resources Division

January 2024

Setting the Foundation



Collaboration Enhances Success



Roles

Interview Panel Lead

(CEO)

- Lead interview process
- Participate as a member of the interview panel

Interview Panel

(CEO, Board members, Exec team member)

- Participate in interview process
- Fairly assess all candidates
- Participate in final candidate selection

CalPERS Human Resources

- Oversee and provide guidance on recruitment and interview process
- Ensure process is merit-based

Executive Search Firm

- Identify a pool of diverse and highly qualified candidates
- Provide insight on candidates
- Observe interviews

Responsibilities of the Interview Panel

Confidentiality

- Protect candidate names
- Protect details of interviews and outcomes

Appropriate Questions

- The same structured questions for all candidates
- Follow-up questions for clarity/additional information
- Avoid personal and non-job-related questions

Document Observations and Assign Ratings

- Use materials provided to take notes
- Capture relevant key information and observations
- Rate candidate responses based on descriptions provided on the interview questions template

Ratings

Not Qualified

0 – 1

Candidate's response demonstrates insufficient understanding of the subject. The candidate is unable to articulate their knowledge, skill, ability, and motivation to perform at this level.

Qualified

2 – 3

Candidate's response adequately demonstrates a general understanding of the subject. Their response indicates possession of knowledge, skill, ability, and motivation to perform satisfactorily at this level.

Well Qualified

4 – 5

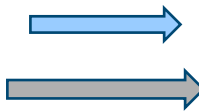
Candidate's response clearly and concisely demonstrates a deep and well-honed understanding of the subject. The response indicates possession of knowledge, skill, ability, and motivation to perform exceedingly well at this level.

Interview Process Overview

INTRODUCTIONS

A few minutes to put the candidate at ease

Interview Panel Lead
Panel Members

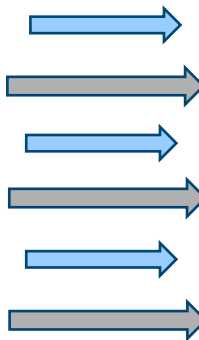


Initiate introductions
Brief self-introduction

INTERVIEW

The bulk of time to gain a good understanding of capabilities

Interview Panel Lead
Candidate
Panel Members
Candidate
Panel Members
Candidate



Set tone; share process
Provide presentation
Ask structured questions
Provide in-depth responses
Gain additional clarity
Provide closing information

Interview Process Overview, cont'd

RATINGS

A few minutes to finalize notes to ensure all key observations are captured

Panel Members

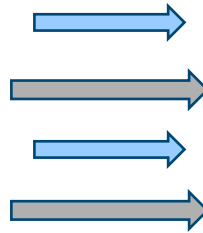


Review notes; assign ratings

DEBRIEF

Time at the end of each day to discuss candidates and finalize ratings

Interview Panel Lead
Panel Members
Executive Search Firm
Panel Members



Engage panel for input
Provide input on candidates
Provide key insights
Finalize scores

The Interview: Making the Most of Your Time

Interview Panel: *The Listeners*

- Listen intently, probe deeper, keep candidate on track
- Clear up points of uncertainty or gain additional clarity
- Allow moments of silence, and let candidate complete their thoughts
- Interject if the candidate is speaking too quickly or too quietly

Candidate: *The Talker*

Carries 80% to 85%
of the discussion

This is the candidate's opportunity to share in-depth responses which highlight why they should be considered for the role.

Bias Awareness

Reduce unconscious bias to support diversity, equity, and inclusion. Be aware of potential biases, such as:

Affinity

Identified commonalities establish candidate preferences.

Confirmation

Form an early perception, then focus on information to support the initial belief.

Halo and Horns

A single positive or negative attribute or response blinds us from other important indicators.

Recency

Recall one candidate more clearly than another due to timing of interview.

Materials

Interview Panel

Dore Documents

- Candidate Resumes
- Candidate Performance Data

CalPERS Documents

- Interview Schedule
- Panel Instructions/Helpful Tips
- Interview Questions and Notes Document with Rating Descriptions
- Interview Script (Panel Lead, only)

Candidates

- Organization Chart
- Interview Questions
- Position Duty Statement (provided by Dore earlier in process)
- Background Check Release Form (at time of second interview, if applicable)

Final Steps

