

Industry perspectives on the impact of restrictive criteria in senior leader job descriptions for market systems development programs

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EXECUTIVE SUMMARY

In the international development industry, the stakes are high and contractors and NGOs alike do not have an incentive to play outside of the boundaries prescribed by donors like USAID through the solicitation process. This study builds upon [earlier research](#) conducted by the authors on the inclusivity of senior leader job descriptions in USAID tender documents. It explores the perspectives of experienced recruiters and program managers who work with medium and large contractors and international NGOs on the unintended impact of key personnel criteria with respect to the diversity of candidates they put forward for senior leader positions.

Key findings include:

- **The number of criteria and years of experience required are rising in job descriptions;** becoming more restrictive which is posing an obstacle to proposing more diverse candidates. At the same time, there are encouraging signs of experimentation.
- There are several underlying issues; **there is not enough incentive to challenge the status quo and to win, you have to ‘play by the rules,’** which is leading to greater exclusion and inefficiencies.
- **Implementing partners (IP) are investing in diversity and inclusion initiatives,** strategically developing diverse talent pipelines and pushing back within the rules of the system.
- However, **these IP-led initiatives are not enough to change the system and they want more voice and responsibility in the process, which is mostly determined by donors.** They also want more guidance on scoring candidates and a better understanding of the rationale for the inclusion of certain stringent criteria.

In addition to these findings, the researchers also identified opportunities to learn from and improve the tender process related to key personnel. These included facilitating discussions between donors and implementers on the characteristics and profiles of successful senior leaders, tracking the real costs of senior leader turnover and learning from non-traditional paths to leadership positions.



“If you put forward Melinda Gates for a woman’s economic empowerment program, she’d do a great job but you wouldn’t win the bid - she hasn’t led a [donor] funded program before.”

- Man recruiter, freelance

[The Canopy Lab](#) would like to thank the staff from the implementing partners and freelance recruiters for participating in this research. The Canopy Lab acknowledges that the views expressed by the implementing partner staff are their own and do not necessarily reflect their respective corporate or organizational views.

ABOUT CANOPY LAB



INTRODUCTION

This is the third brief in the inclusion and leadership series by the Canopy Lab. The series seeks to promote industry reflection and dialogue by asking, ‘what are the biases, structures, relationships and rules which influence who is selected for leadership jobs, and under which circumstances?’

In the international development industry, the criteria in solicitation document job descriptions set ‘the rules’ by which all actors play. The criteria determine who qualifies for management positions, as outlined in tender documents, and restrict who development companies and organizations are willing to recruit. This has unintentional consequences for the diversity of leadership on development programs. Market actors, NGOs and contractors, have no incentive to take a risk on a candidate who does not meet 100% of required or desired criteria, even when they may believe another less qualified candidate is a better fit for the role.

Recent Canopy Lab research examining the level of inclusivity of Chief of Party (CoP)/Team Leader criteria in market systems (MSD) and private sector development (PSD) USAID solicitation documents showed that both the number of criteria and years of experience required in senior leader job descriptions has been modestly increasing over the last several years. The upward trends in the number of criteria and years of experience matters for inclusion broadly, and women specifically. Research shows that both aspects can have an adverse impact on who decides to apply for a given senior leader role.



METHODOLOGY

To better understand the impact of the criteria included in solicitation document job descriptions as well as the opportunities and constraints to leveling the playing field for more diverse senior leader candidates including cooperating country nationals (CCNs) and third-country nationals (TCNs), the authors used a convenience sampling strategy to identify respondents and conducted in-depth interviews with 16 recruiters from seven international development companies and organizations. The focus of the research was on USAID and included insights from experiences with other leading donors such as European Commission (EC), the UK’s Foreign, Commonwealth and Development Office (FCDO) and Global Affairs Canada (GAC).

Key research questions included:

- What trends have recruiters observed with regards to years of experience and number of criteria for senior leader positions?
- What obstacles do recruiters face in recruiting their preferred candidates for senior leader positions? Are specific groups more excluded than others?
- How can the industry (contractors, (I)NGOs, and donors) improve the diversity of its senior leaders on market systems programs?

There were several limitations to the research and they included:

- Potential for sample bias due to convenience sampling strategy employed.
- Small sample size.
- Lack of previous research on the subject for the development industry.



RESEARCH FINDINGS

The findings respond to the research question:

What trends have recruiters observed with regards to years of experience and number of criteria for senior leader positions?

The number of criteria and years of experience are rising and becoming more prescriptive and as a result more restrictive.

The research revealed a near universal agreement among the recruiters that the number of criteria and years of experience required were both increasing, confirming the earlier study findings. In addition to the increase in number of criteria and years of experience, the recruiters highlighted other trends including an increase in the prescriptiveness of criteria, the reinterpretation of preferred requirements as required and fewer opportunities to substitute different types of experience (e.g. 5 years of experience substituting for an advanced degree).



“[I am] seeing really prescriptive requirements around past experience, leading projects of similar sizes and complexity in terms of the dollar amount of the project or scope.”

- Woman recruiter, mid-size implementing partner

“A current Rwanda RFP required 15 years of CoP experience and contractors pushed back during Q&A and USAID reconfirmed that it is 15 years of prior CoP experience.”

- Woman recruiter, freelance

“I see the language changing in the requirements, but at the end of the day - it looks virtually the same - still asking for [an] advanced degree and proven experience in [a] similar role.”

- Woman program director, mid-size implementing partner

“When USAID writes preferred it means required, [there] should be differentiation between required, preferred, desired, etc.”

- Man recruiter, mid-size implementing partner



Posing a real obstacle to proposing more diverse candidates including those with adaptive management skills.

The research also confirmed that rigorous criteria for senior leadership positions was a formidable obstacle to proposing more diverse candidates. Women, Cooperating Country Nationals (CCNs) and Third-Country Nationals (TCNs) were the excluded groups most frequently cited. According to several recruiters, the emphasis on objective technical skills made it challenging to present candidates with strong adaptive management skills (e.g. critical thinking, collaboration and communication skills) which they also said can be more difficult to evaluate and score.

At the same time, there are encouraging signs of experimentation.

While the research confirmed the general trends of rising requirements and years of experience for senior leadership positions, a few of the most experienced recruiters cited encouraging examples of experimentation with key personnel requirements from USAID. These included initiatives which used ‘team-based’ scoring instead of scoring each key personnel individually. These recruiters saw this as part of the broader procurement reform trends including the elimination of salary history from the biodata form.

“From my perspective USAID overall is doing a much better job in recent years. As of October [2019] USAID eliminated the salary history from the biodata form. That was a progressive act to eliminate the gender equity gap.”

- Woman recruiter, large-size implementing partner



UNDERLYING ISSUES

The findings respond to the research question:

What obstacles do recruiters face in recruiting their preferred candidates for senior leader positions? Are specific groups more excluded than others?

The experimentation at USAID amidst broader US Government (USG) procurement reforms which seek to reduce obstacles and level the playing field for women, people of color, TCNs and CCNs are encouraging but are just the tip of the proverbial iceberg. The research revealed a host of underlying rules and biases that seem to unintentionally privilege certain groups and reinforce the status quo of who qualifies for senior leadership positions.

To win, you have to play by the rules.

There is no reward for second place in competitive tenders. The recruiters interviewed repeatedly pointed to the reality of having to meet and exceed requirements listed for key personnel in tender documents.



“When we have strict requirements, we have to bid the requirements. We can’t go in non-compliant.”

- Woman recruiter, mid-size implementing partner

“Have to be compliant with every single bullet. You want to bring in people with lots of private sector experience, but maybe never led a USAID project of similar size and complexity. If they haven’t done that exact thing before, it can be a barrier. USAID wants someone experienced at the helm. But if you want someone with new ideas and maybe didn’t lead early on in [their] career, you can’t do that.”

- Woman recruiter, mid-size implementing partner

There is no reward for challenging the status quo.

The recruiters shared that though they may push back against the criteria in subtle ways, particularly at the Q&A session, they have no incentive to submit a non-compliant candidate and will not take on the risk of submitting someone they know can deliver the work but does not meet or exceed every requirement. As a result, they find themselves resorting to the same small pool of candidates.



“On a bid you are never going to take that risk [of submitting someone who does not meet the requirements].”

- Man recruiter, mid-size implementing partner

“[Traditional candidates] may not always be the best people for the job but you go with them because either your bid gets thrown out or someone else goes with them.”

- Man recruiter, freelance

(Mis)perception that similar experience equates to future success.

According to several recruiters interviewed, one of the most important underlying issues is that donors rely heavily on years of similar experience as an indicator of a candidate’s likelihood for success. From the perspective of the recruiters, similar experience was not necessarily a good predictor of future success. It also made it difficult for talented development professionals to break into the CoP position.

The reliance on years of experience appeared to stem from the donors’ desire to minimize risks. The concept that donors are highly risk averse and want familiarity surfaced a few times during interviews. Recruiters, however, pointed to other factors such as the presence of managerial and soft skills which were often, in their experience, better indications of a candidate’s potential for success in a senior leader role.

Contributing to an uncertain bid process and uncondusive regulations.

In addition, the long lead times between proposal and start-up, the uncertainty of the bid process and remuneration regulations were also identified as underlying obstacles to proposing more diverse candidates. The length and ambiguity of the bid process were cited as factors which deterred some women from pursuing senior leadership roles. While the remuneration policies were bigger obstacles to recruiting TCNs and CCNs.

And, aggravating the effects of sticky social norms.

Lastly, recruiters identified certain social norms which influence the supply of women candidates. First, several recruiters pointed out that, unlike men, women were less likely to put themselves forward for senior leadership positions when they don’t consider themselves fully qualified. One recruiter mentioned that he has recurring conversations with women candidates who have not submitted their application because they did not meet 100% of the qualifications for the position. Others highlighted the challenges women face in amassing the necessary years of experience because of social pressures to prioritize relationships over career advancement.

Several recruiters mentioned how women development professionals in their thirties often face a difficult decision between continuing to seize opportunities for professional advancement in the field and pursuing personal relationships. While not necessarily mutually exclusive, a recruiter anecdotally pointed out that there are fewer men trailing spouses than women in overseas posts.

“You can’t become a CoP without CoP experience on your CV.”

- Woman program director, mid-size implementing partner

“Prior donor experience as a requisite...is your classic catch-22.”

- Woman recruiter, freelance



“The uncertainty of bids may hinder women from entering these sorts of senior leadership roles.”

- Man recruiter, large-size implementing partner

“A big problem for cooperating country nationals: they are not eligible for all the allowances, salary becomes a restrictive issue; maybe [they] can get a waiver but still have to adhere to AID max [policy] of \$183, how do we incentivize him/her to take a role?”

- Woman program director, mid-size implementing partner



“Who gets an opportunity in the first place to advance at all or to work in these types of environments? [...] the pipeline also has a problem. [There are] not as many women who are in top COP roles because [there are] not as many women who are getting to that level for other reasons that do not have to do with that job description.”

- Woman recruiter, large-size implementing partner

HOW IMPLEMENTING PARTNERS ARE ADDRESSING THE ISSUE

This section responds to the research question:

How can the industry (contractors, NGOs, and donors) improve the diversity of its senior leaders on market systems programs?

Investing in diversity & inclusion initiatives.

While the respondents agreed that donors can exert tremendous influence on the level of diversity and inclusion in the system, most pointed to diversity and inclusion (D&I) initiatives underway at their respective organizations to address the lack of representation of women and people of color in senior leadership roles as well as a personal responsibility to be more inclusive in their efforts.

Many highlighted different systems, processes and tools that their companies and organizations are using and or piloting to build gender balanced and more inclusive teams.

“We have a major responsibility to do better with what we have. We’re all doing diversity and inclusion training for our own personal development.”

- Woman recruiter, mid-size implementing partner



“We include inclusion and gender screening questions as well in interview questions. We’re focused on building a gender-balanced team. We have experience not moving male candidates further after their first screen, based on their answers to these questions - we ask about their last team and what they thought about it, whether there is any substance to their views.”

- Woman recruiter, large-size implementing partner

“We are going to try a blind CV evaluation approach to see if [it] has any influence on who has been selected to eliminate unconscious [bias].”

- Man project manager, mid-size implementing partner



One recruiter highlighted the impact of the company’s Chief Diversity Officer and how this executive has been able to effectively cascade diversity and inclusion efforts, including tying some bonuses to D&I targets, throughout the organization.



“We have a Chief Diversity Officer...pushed a lot of corporate D&I which cascaded through the organization. Some of leaderships’ bonuses are tied to D&I. Started with gender, then race, now looking at [other aspects]. We see it is a value proposition.”

- Man recruiter, large-size implementing partner

Developing a diverse talent pipeline.

Several recruiters shared how their respective companies were proactively developing a pipeline of more diverse candidates. Some organizations sought to develop relevant qualifications for top talent by putting them on bids for donors with less restrictive requirements for senior leadership positions or bids which have more flexibility in demonstrating staffing relevance.

Other organizations and companies took advantage of CoP turnover (intentional or not) to bring in leaders with less traditional backgrounds. This route was favored when there was a strong, existing relationship with the mission.

Recruiters from larger companies and organizations mentioned that they were able to be more strategic and create opportunities for home office staff, particularly project managers, to travel to the field and develop over time a relationship with the missions.

“Yes, we’ve put in a few bids we’ve showcased that transition plan, we’ve found USAID responsive -especially when we are the incumbent, and they know us and the DCoP.”

- Woman program director, mid-size implementing partner

Nudging back.

Recruiters from large and mid-size companies and organizations also highlighted how they tried to influence the criteria by exploring the firmness of certain key personnel criteria during Q&A sessions. Respondents were mixed about the effectiveness of this tactic.

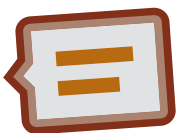


“During Q&A we’ll ask if we can be flexible on any of these points. Sometimes they say yes, sometimes no. [...] we don’t have a perfect solution to that.”

- Woman recruiter, mid-size implementing partner

“We might be unique in this, we push back a lot when USAID releases a pre-solicitation - push back on requirements during Q&A - e.g. can we present a candidate with demonstrated experience but not 15 years of experience. We as implementers have the responsibility, most of the time USAID are open to it.”

- Woman program director, mid-size implementing partner



RECRUITER RECOMMENDATIONS TO DONORS

The rules of the game matter. As long as the criteria remain restrictive, recruiters, in spite of corporate-led diversity and inclusion efforts and personal interest in putting forward different types of candidates, have little agency to influence the diversity of the senior leader candidates put forward.

Overall, recruiters desire more voice and responsibility in the tender process. They want more guidance on scoring, particularly for soft-skills criteria such as adaptive management. Lastly, they seek more insight and understanding of the rationale for criteria in key personnel descriptions, especially when they appear at odds with what may be available in the market. The following are the most sought changes:

Ask for fewer requirements and make them more flexible.

Fewer and more flexible requirements were the most cited recommendations to improve the diversity of senior leader candidates. Recruiters stated that less prescriptive requirements would allow them to put forward candidates with more diverse profiles and experiences. They reported that even subtle language changes such as asking for extensive experience instead of a specific number of years may make an important difference.

“More open requirements make it easier to find people who are going to be best at the work.”
-Woman recruiter, mid-size implementing partner

“Having more open requirements will help contractors find [a] more diverse pool of candidates.”
-Woman recruiter, mid-size implementing partner

“Years of experience is one of the biggest things. Asking for extensive experience instead of having a number in there. Maybe not asking for ‘senior leadership in similar program in size and scope,’ chances of getting a woman are very slim. I believe we’ve also made steps forward, they’re not requiring much USAID experience. But yes the question of same size and scope is still there.”

- Woman recruiter, large-size implementing partner



Give us more say in deciding who on the team will do what.

Several recruiters mentioned the introduction of ‘team scoring’ as a welcomed change. The shift to scoring the team and accompanying management plan instead of individual key personnel afforded them more flexibility and enabled them to propose a more diverse range of staff for senior leadership positions. It also allowed their organizations to make the decision about what skills and profiles are needed to succeed for different projects, recognizing that this may differ from project to project.

Others pointed out that the current process is inefficient. It does not take advantage of the expertise of implementing partners. Further, the long lead times between solicitation and award mean that candidates proposed on the bid may no longer be available during the implementation period.

It should be noted that some recruiters did raise reservations about this approach due to the potential increase in the subjectivity of scoring.



“I never understood why there was any criteria [...] I never understood why USAID doesn’t say give us your best candidate and explain to us why they are the best candidate. Why don’t they let the industry come up with the best candidate. They are [the ones] implementing and have a good sense of what is needed in that role.”

-Woman program director, mid-size implementing partner

Provide us with more guidance on how different adaptive management and soft-skills will be scored.

In several of the interviews there was a tension between wanting to introduce more flexibility in the criteria to increase the likelihood of proposing more diverse candidates and concerns that it would introduce more subjectivity into the evaluation process. In general, recruiters wanted more guidance on how soft skills including adaptive management skills would be scored.

Other recommendations from recruiters included co-creating senior leader job descriptions and requirements, using competency-based criteria and allowing for more interviewing during the bid process.



“Our business development people asked how [is USAID] going to award points? You have business interest running alongside social inclusion issues. I think there are a lot of pieces to this puzzle.”

- Man recruiter, mid-size implementing partner



ADDITIONAL CONSIDERATIONS

. Let's talk about the elephant.

There is an inherent imbalance in the relationship between donors and implementing partners. The impact of this imbalance manifests in many ways but one of the most important for the diversity of senior leader candidates is the lack of effective feedback loops between donors and implementers on the characteristics of successful senior leaders. This research shows that there is a disconnect between the types of candidates sought by USAID and other donors and the profile of the candidates that implementers believe will be successful on a given project - in extreme cases, bidders propose candidates whom they know to be poor performers, but who will nonetheless score highly on a proposal review (and help the bidder win the proposal).

Some recruiters attributed the source of the disconnect to a lack of technical skills (e.g. human resource management). Others suggested it was a lack of direct exposure to the challenges of program implementation that led to the misperception that years of experience could be a strong indication of suitability for a role as opposed to other soft skills and or private sector experience.

Regardless of the exact origin of the disconnect, recruiters provided suggestions on how to bring the two different perspectives closer together. One recruiter suggested that donors provide the rationale for key personnel requirements in the solicitation document. Another suggested providing more transparency on how criteria for key personnel or job descriptions are developed and finalized within donor agencies. One respondent even suggested organizing roundtable discussions between donors and implementers to discuss broadening the definition of who qualifies for senior leadership roles.

Ensuring that technical and contracting officers from donors participate in such an event is important because a few respondents remarked that there may be disagreement within the different departments of the donor agency about what constitutes a good senior leader.

Let's understand the costs of perpetuating the status quo.

The development industry does not incentivize long tenures with programs. The respondents were nearly universal in the agreement that they expected some level of turnover in their programs. This turnover was attributed to a range of different reasons including a poor initial fit for the role.



“For a five-year program the assumption is of at least three CoPs... there is never any illusion that a CoP is going to stick around for the entire five years.”

- Woman recruiter, freelance

But the research shows that industry can be doing more to align the criteria in the key personnel job descriptions to increase the diversity of candidates and the likelihood of their success in the role. The high turnover rate among senior personnel, especially at the start of a program, has significant costs both in terms of money spent mobilizing and demobilizing staff and recruitment but also in less tangible, but equally important, costs in program progress and momentum, in addition to staff and partner relationships and trust.

To fully understand the extent of the detrimental impact of frequent senior staff turnover, it makes sense to systematically track turnover both on the donor and implementer side and conduct rigorous exit interviews

with the aim of reducing staff turnover. This data can also importantly be used to inform a debate about the characteristics and profiles of successful senior leaders.

Let's learn from nontraditional paths to leadership roles.

The one time that recruiters were able to more flexibly interpret key personnel criteria and consequently put forward more diverse candidates was when a project was already in implementation and a senior leader left (or was asked to leave). Recruiters attributed the flexibility to the relationship that their company or organization had developed with the local mission.

In these cases, the project was already awarded, and the implementer and donor go through a collaborative process of selecting a suitable candidate. Could this process be replicated in the formal tender process?



CONCLUSION & CALL TO ACTION

The research shows that donors, USAID in particular, could have an immediate impact on the diversity of CoP and Team Leaders by revisiting the criteria in tender documents about who is qualified to manage market systems development programs. While the solution seems well within reach, the research shows that there are several underlying issues ranging from a lack of incentives to challenge the rules of the game to misperceptions about characteristics of successful senior leaders to biased social norms, which perpetuate the status quo when it comes to selecting criteria for senior leadership positions and putting forward potential candidates.

In recognition of the complicated issues at play, one recruiter believed that change would only come from the top.

“To get [the criteria or process] to change, it would have to come from the top. USAID leadership would need to be saying that this is a priority for us and start pushing it.”

- Woman program director, mid-size implementing partner



The good news is that some within USAID are already trying to test different approaches and the implementing partners are increasingly seeing the diversity of their senior leaders as a priority and as a result are investing in creating more conducive work environments and developing their own pipelines of diverse future leaders.

These are important steps, but it is clear that as an industry, if we want to be led by more diverse people, we must take action. We need to:

- Start talking more openly about the underlying mental models and unconscious bias which prevent both donors and implementing partners from changing the structures, like criteria in job descriptions for key personnel, which preserve the status quo.
- Have a dialogue between implementers and donors about useful criteria for and expectations of program managers and management teams and inclusive ways development organizations can develop a cadre of program management professionals.
- Test more approaches to increase the diversity of senior leadership teams in market systems development programs and decrease the inefficiencies in the process.