The Nanny Agency School

How to launch and grow a nanny agency the right way!

Stephanie Bauchum

Module 4

Candidate Intake Process

Welcome to module 4 of The Nanny Agency School: How to launch and grow a nanny agency the right way! In this module, we'll cover the Candidate intake process. Remember, the only way to succeed as an agency owner is to properly source, prescreen and present quality and qualified candidates. We will cover:

Finding suitable candidates

The pre-screening process

Connecting Candidates & Families

Perform each task at your own pace and share your updates in our private Facebook group! Remember to email questions to info@nannyagencyschool.com

Module 4
Candidate Intake Process

Finding Suitable Candidates

Finding suitable candidates is the lifeline of your agency. It's important to properly pre-screen candidates, as they are a direct representation and reflection of you and your agency. Having systems in place, along with agency standards, contracts and expectations will definitely set you up for success. When a client is satisfied with a service, they're likely to refer you to their network. Before we dive in to finding suitable candidates, let's quickly review the type of services your agency will provide.

Placements:

1. Permanent placements - The client becomes the employer, while you are the retained agent who sources and refers the candidate.
2. Temporary placement - The client only requires as needed , on call or short term in home service. The client can pay the placement directly at the end of their shift, or the agency hires the candidate and pays them via check. If hired through your agency, taxes are taken out and the hire becomes an employee of the agency.
3. Corporate backup care - The agency works directly with hr or a corporate backup care company to provide in home childcare or elderly care for their employees. The agency hires the placement, the company or corporate backup care company pays the agency, and the agency pays the placement directly. Taxes are always taken out.
4. Special event and wedding childcare. Agency hires employees for special event and wedding childcare, and pays the candidate directly. Taxes are taken out and the the hire becomes an employee of the agency.

Agency Candidate Onboarding Responsibility

Because clients are retaining the services of your agency to find suitable candidates, it is imperative to decide how your onboarding process will flow. What does the process look like to be a registered candidate with your agency? Candidates who are serious about placement with families will be happy to follow all onboard procedures.   Do not cut out steps nor rush the candidate onboarding process. Be very clear on agency expectations and requirements to become a potential candidate for employment. Also consider creating a candidate welcome packet that outlines your agency process.

Module 4
Candidate Intake Process

How to Find Suitable Candidates

1. Candidate can apply through a third party which leads to the required application via your agency website. Example third party sites include Indeed.com, Zip Recruiter, Monster etc. Also consider posting on college job boards, in nanny, sitter or job Facebook groups, ask your local network, download neighborhood apps, become a vendor a job fairs and share on your personal social media pages. Hashtags still work!
2. The third party system can be utilized as the "pre application"
3. Candidate must complete your agency website application to start the in take process. I highly recommend investing in a CRM that will automatically create a profile for each applicant, and give them access to a profile to edit and upload required documents if they are accepted into your agency. This is a huge time saver with your onboarding process. Invest when you're ready to make the financial commitment!
4. After the application is complete, schedule an initial interview to learn more about the candidate. This can be done virtually or in person. If in person, I recommend scheduling interviews back to back in your office or in a public setting.
5. Call references and former employers.
6. Make sure the candidate is CPR/First Aid certified, has educational requirements i.e. high school diploma. Certifications must be renewed and up to date before taking jobs.
7. Once the application process is complete, and the candidate is accepted, they are ready to be considered for jobs.

* Please refer to the candidate Interview Questions template for guidance on the candidate pre-screening flow.*

When should I run the background check?
If the candidate meets all requirements and is ready to interview, background checks can either be done up front, or before the candidate meets a family in person. If the candidate is registering as a temp, always run the background check after calling references and after the candidate has completed all application requirements. Running background checks is an investment, however knowing their status ahead of time helps to maintain the integrity of your agency, and also makes sure clients, families and children are safe.

Module 4
Candidate Intake Process

Candidate Application Content

Your agency application should be thorough and straight to the point. If you have the right CRM, your applicant can update their application and file anytime. Here are a few key application options to include:

Name
Date of Birth
Are you legally able to work in the US (or your country/province)
Are you currently employed?
Anticipated start date
Job interest i.e. nanny, household manager, personal assistant, nanny/manager, sitter etc.
Are your CPR/First Aid certified
Education (give them the option to check multiple boxes)
Are you comfortable with working around pets?
Please list any allergies
Do you have reliable transportation to get to and from work?
Do you agree to a background check?
Have you been convicted of any crimes/felonies etc?
Please share 3 work references, not including family or friends
Why are you interested in working as a ....
If applicable, share your preferred method of discipline
Are you ok with signing an NDA with a family?
Why do you love working with children or private families?
Share age appropriate activities you enjoy?
Are you ok if parents work in the home?
Anything else we should know?

Module 4

Connecting Candidates & Families

Once a candidate has completed the pre-screening process and meets all requirements, they are ready to be presented to families. Depending on your CRM or onboarding platform, it's best to present candidates through a link. This link should exclude the candidate's last name and any contact information. Most profiles will include a photo or a welcome video from the candidate, but this is optional. I highly recommend including a professional photo of each candidate. It shows their personality and it's a great first impression. Be mindful of including photos with children, unless the candidate has consent from the family to use the photo.

Once a family decides if they'd like to move forward with an interview, work with them to present the candidate with multiple interview dates/times to choose from. Once an interview time is solidified, you can create a zoom link to present to the family and candidate, or the family can send a zoom link to present to the candidate. Make sure you're involved in everything and all settings allow the client and candidate to join the virtual chat anytime. Google Meet and Skype are great alternatives.

The biggest thing is to avoid sharing any contact info from the client and candidate to avoid soliciting services outside of your agency. This should be outlined in your agency and candidate agreement.

If the virtual interview goes well, and the family would like to meet the candidate, run a background check before any in person meeting. If the in person meeting goes well, always suggest a 2-3 day trial period before a family extends an offer. The trial period can be normal working hours or a few hours a day. If a family would like a longer trial period, they are welcome to pay agency fees for temp placement services.

Once a family decides to hire the candidate, make sure both parties review and sign a working agreement. It's a great idea to get involved in the details, and present a sample agreement that the family and candidate can edit. Be ready to answer questions and offer guidance along the way.

Once both parties sign the agreement and the initial start date is solidified, collect the final placement fee before the placement begins work.

Create a follow up plan to stay in touch with clients and placements. Always be available to answer questions and offer support on both ends.

Notes