[Company Name / Logo]

Form Document: Recruitment and Selection Checklist

Introduction

This form is a useful checklist which takes the hiring manager through each stage of the recruitment process, ensuring key activities are completed at each relevant stage.

How to Generate Your Form

Throughout the policy, you will see <red text> for any details that should be customised with your own relevant information. Text in *blue italics* is for your information only and should be removed from the final document.

Customising Your Policy

You will find a checklist of customisations at the end of the document. Please run though this once you have completed your customisations. You will also need to **delete this page by clicking Insert -> Cover Page -> Remove Current Cover Page. You should delete this prior to updating your table of contents, to ensure that the page references are all correct.**

[Company Name / Logo]

Recruitment and Selection Checklist

Following the UK leaving the European Union, EU, EEA and Swiss nationals must have settled or pre-settled immigration status or hold a valid visa to work in the UK.

*<Set up a separate file for each vacancy.>*

|  |  |
| --- | --- |
| **Position** |  |
| **Department** |  |
| **Location** |  |
| **Reporting to**  |  |

Position

|  |  |  |
| --- | --- | --- |
|  | **Task complete** | **Comments** |
| 1. Identify and define the job and criteria by completing a:
2. job description
3. person specification.
 | ☐ |  |
| 1. Considering the role in the context of equality, diversity and inclusion, identify whether the position can be any of the following (adding further comments as necessary):
2. full time
3. part time
4. open ended
5. fixed term
6. hybrid/flexible.
 | ☐ |  |
| 1. Decide on the salary scale for the role.
 | ☐ |  |
| 1. *<Optional: If recruiting outside the UK>* Identify the skill level of the job by referring to immigration job codes.
 | ☐ |  |

Advertising

|  |  |  |
| --- | --- | --- |
|  | **Task complete** | **Comments** |
| *<Optional: If advertising in press>* Write and design advert, ensure proof and costs are agreed before publishing.  | ☐ |  |
| *<Optional: If using recruitment agencies>* Contact and give details to the recruitment agency, ensure terms and conditions are agreed prior to agency proceeding.  | ☐ |  |
| Ensure a closing date is identified *<optional: and given to agencies>* and included on advert if required.  | ☐ |  |
| Advertise role(s) internally. | ☐ |  |
| Keep a copy of the advert in the recruitment file for this position together with any correspondence. *<optional: agency terms and conditions, etc>* | ☐ |  |

Applications

|  |  |  |
| --- | --- | --- |
|  | **Task complete** | **Comments** |
| 1. Record all applications on a tracker sheet.
 | ☐ |  |
| 1. Depending upon circumstances, select from the following:
2. acknowledge receipt of application
3. send shortlisted or on-hold letters
4. send letters of regret
5. send out invite to interview letters.
 | ☐ |  |

Interviews

|  |  |  |
| --- | --- | --- |
|  | **Task complete** | **Comments** |
| 1. Prepare by:
2. establishing a timetable for interviews
3. including in interview paperwork a copy of the candidate’s application, job description, person spec, advert, terms and conditions of employment, list of questions linked to person spec, CV and job description, to try to establish a fit to company culture.
 | ☐ |  |
| 1. *<Optional: If the interview is in person>* Ensure a quiet, tidy room with refreshments is available.
 | ☐ |  |
| 1. *<Optional: If the interview is remote>* Ensure a meeting invite link is sent to all attendees in advance of the interview.
 | ☐ |  |
| 1. Accommodate reasonable adjustments if the candidate requests any.
 | ☐ |  |
| 1. Try not to delay the interview. Make candidate(s) feel welcome to try to get them to relax. Keep the interview to a maximum of one hour.
 | ☐ |  |
| 1. At the end of the interview, inform the candidate of when they will hear about the outcome.
 | ☐ |  |
| 1. If necessary, arrange a second interview, following points 7-12 again.
 | ☐ |  |

Post Interview

|  |  |  |
| --- | --- | --- |
|  | **Task complete** | **Comments** |
| 1. Assess the candidate using the Interview Assessment Form, ensuring that when rating the candidate:
2. you are objective
3. evidence can be measured and justified
4. work experience required is realistic.

The primary objective of the interview is to ensure you select the best person available for the job who meets the person spec most closely. | ☐ |  |
| 1. Once the candidate is selected, send out letters of regret to those not selected. This may include informing them that they were close, and you will keep their application on file.
 | ☐ |  |
| 1. You may wish to have a reserve candidate in case the first choice rejects your offer.
 | ☐ |  |
| 1. You may wish to telephone the first choice and assess their interest in your offer first.
 | ☐ |  |
| 1. Send out offer letter and associated documents.
 | ☐ |  |
| 1. Keep all rejected applications and documents from the recruitment process for at least six months. This is to ensure compliance with data protection requirements and in case an applicant asks for a copy of the notes taken at their interview. This also applies in case of any discrimination claim.
 | ☐ |  |
| 1. Ensure all invoices for the above recruitment are correct.
 | ☐ |  |

|  |  |
| --- | --- |
| **Position advertised in** |  |
| **Cost** |  |
| *<Optional: Position placed with the following agencies>*  |  |
| **Fees agreed**  |  |
| **Total cost for the above recruitment** |  |

Checklist

Upon completion of customisations please ensure you have:

* customised all red relevant text and removed all blue italic text
* diarised a reminder to review and update the form
* removed the front cover (see instructions on front cover)
* removed this checklist!