

Recruitment Checklist

This checklist gives a brief overview of the steps to follow in recruiting a candidate.
Employers can adapt this template to their needs.

Name of vacancy:

Planned start date of new recruit:

Step 1 – Plan	Task done by:	Date:
<i>Identify staff needed: where, why and plan for the future</i>		

Step 2 – Prepare	Task done by:	Date:
<i>Consider if: any of the aims of the job have changed and how this may affect factors such as the skills required and workflow</i>		

Step 3 – Compile documents for the vacancy	Task done by:	Date:
<i>Job Description</i>		
<i>Person Specification</i>		
<i>Job Application Form</i>		
<i>Equality & diversity monitoring form</i>		
<i>Job offers letter template/Written Statement of Terms and Conditions of Employment</i>		

<i>Decide whether candidates will be asked for references and at what point – the shortlist stage or when offered the job</i>		
<i>Make sure you understand the rules <u>hiring someone from outside the UK</u> – these changed on 1 January 2021</i>		

Step 4 – Advertise	Task done by:	Date:
<i>Before drawing up the job ad, decide factors such as how candidates should apply, who will sift applications and the rate of pay</i>		
<i>Choose where to advertise in at least two different channels</i>		
<i>Compile the job ad, carefully ensuring the wording is not discriminatory</i>		

Step 5 Handle Applications	Task done by:	Date:
<i>Send 'application pack' to applicants:</i>		
<i>Application Form</i>		
<i>Job Description</i>		
<i>Person Specification</i>		
<i>Equality & Diversity</i>		
<i>Monitoring Form</i>		

<i>Information pack about organisation</i>		
<i>Using the job description, person specification and application forms, at least two people trained for the task should objectively draw up a shortlist of candidates for interview and/or further assessment</i>		
<i>Invite shortlisted candidates for interview/assessment, and ask whether they need any 'reasonable adjustments', often called 'access requirements', for any part of the recruitment process</i>		
<i>Plan questions to probe skills and qualities essential for the job</i>		
<i>Decide how candidates' answers will be scored</i>		
<i>Anticipate candidates' questions and have the info ready</i>		
<i>Plan any selection tests/ presentations etc and how they will be scored</i>		
<i>Let the candidates know what they'll be asked to do, and if they need to prepare anything before the test or interview</i>		
<i>Book a private room which will not be interrupted by telephone calls or visitors</i>		

Step 6 - Conduct the interview:	Task done by:	Date:
<i>Welcome the candidate and give them a little time to get their own materials to hand</i>		
<i>Briefly outline the job and the organisation, then move to the first question</i>		
<i>Ask questions which cannot be answered 'yes' or 'no'. They usually begin with 'what', 'why', 'when' or 'how'</i>		
<i>Do not ask for personal information or personal views irrelevant to the job, or potentially discriminatory questions</i>		
<i>Do not ask health-related questions before making a job offer</i>		
<i>Listen and make brief notes on key points</i>		
<i>Keep to the time frame for the interview, but allow for the candidate's questions</i>		
<i>Tell the candidate when they can expect to hear from the organisation</i>		
<i>Explain that a job offer to the successful candidate will be subject to pre-employment checks – including immigration checks</i>		
<i>Ask the candidate if they have any questions about the job</i>		
<i>Select the best candidate for the job using the scoring method decided earlier in Step 5</i>		

Step 6 - Complete Final Details	Task done by:	Date:
<i>Send the successful candidate a job offer letter and explain pre-employment checks will have to be made</i>		
<i>Make pre-employment checks such as the candidate's right to work in the UK and references. See the template outline of a pre-employment checklist</i>		
<i>Resolve any employment contract queries</i>		

Step 7 - Before the recruit starts their new job:	Task done by:	Date:
<i>Give them their Written Statement of Terms and Conditions of Employment</i>		
<i>Remind them where to find out about the organisation's procedures and policies</i>		
<i>Write to unsuccessful candidates and give carefully considered feedback if requested</i>		