

MANAGER’S RECRUITMENT GUIDANCE

STAGE 1 – PLANNING

This toolkit has been designed to provide hiring managers with an overview of the tools and resources available that will assist them in carrying out a recruitment exercise.

A Planning Checklist is available to download from the recruitment information webpage as an aide memoire and to assist Hiring Managers at the planning stage.

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KEY ROLES AND DEFINITIONS

Hiring Manager	<p>The Hiring Manager is the person responsible for creating the Staff Requisition and completing the recruitment activities to fill the vacancy.</p> <p>For EA Corporate recruitment, it is anticipated that the Hiring Manager will be the Line Manager or Service Manager.</p> <p>For Schools, it is recognised that the duties of the Hiring Manager cut across those of the Chair of the Board of Governors (as Chair of the selection panel), and of the Principal (as Secretary to the selection panel).</p>
HR Recruiter	<p>On receipt of the Staff Requisition, the Hiring Manager will be assigned a HR Recruiter to oversee their recruitment exercise, and to advise and guide the Hiring Manager through the recruitment and selection process.</p>
Chairperson	<p>It is anticipated that in most cases the Hiring Manager will fulfil the role of Chair of the selection panel. For Schools, the Chair of the Board of Governors would act as Chair of the selection panel.</p>

1. AGREEING THE JOB DESCRIPTION & PERSON SPECIFICATION

The Hiring Manager is responsible for preparing and agreeing the job description and person specification:

FOR AN EXISTING CORPORATE POST

When a vacancy arises you will need to begin working on the relevant job description and person specification for the role. A sample set of corporate job descriptions are available to download from the recruitment information webpage as a point of reference on the newly aligned format.

The job description and person specification should always be reviewed to ensure that it is up to date and relevant for the organisation's needs.

If fundamental changes are required to an existing job description (e.g. the scope of the role, or responsibilities of the post holder), the job description may need to be re-evaluated before a recruitment exercise can be progressed.

FOR AN EXISTING SCHOOL BASED POST

School based job descriptions are well defined, and the generic job descriptions should sufficiently cover most roles. School based job descriptions are available for selection from the template library on the online recruitment platform when raising your requisition.

A sample set of school based job descriptions are also available to download from the recruitment information webpage as a point of reference on the newly aligned format.

In exceptional circumstances, where there are additional specific requirements, it is recommended that the Hiring Manager consults their HR Business Partner for guidance on whether these fall within the grade of the post or if a job evaluation exercise needs to be conducted.

FOR A SCHOOL LEADERSHIP POST – PRELIMINARY MEETING

When a school leadership post arises the selection panel will normally meet at the outset of the process to conduct a preliminary meeting to agree the job documentation and arrangements for the recruitment of the post. In the case of a principal appointment, the selection panel will always hold a preliminary meeting attended by a Human Resources Adviser and an appointed Assessor. Further information on the role of an Assessor can be found in Appendix 1 of the Teaching Appointments Scheme for Controlled Schools.

FOR A NEW POST

This involves writing the job description and person specification using the Job Description / Person Specification Template that is available to download from the recruitment information webpage. The hiring manager is also responsible for ensuring that a job evaluation exercise is completed where appropriate in order to determine the grade and salary for the new post.

In writing or reviewing the job description and person specification the Hiring Manager should consider the purpose of the job and its associated requirements. It may be helpful to think about these under the following headings, which will help develop the component parts of the job description and person specification:

Key Questions

- What needs to be done?
- Why is it done?
- When is it done?
- How is it done?
- Where is it done?
- Who else is important?

Responsibilities

- For staff reporting to the post holder, direct and indirect
- For equipment, machinery and materials
- For financial resources e.g. money, budgets

Relationships

- With senior management and leaders
- With colleagues, internally and externally
- With other parts of EA, including the wider organisation
- With child and young people, and their parents/guardians
- With the public and significant external stakeholders

Job Requirements

- Standards of performance and outputs of the job
- Technical skills and experience
- Knowledge and any areas of specialism
- Education, qualifications and training
- Professional registration or membership
- Personal qualities, e.g. ability to build effective work relationships, or to motivate and inspire others

Working Conditions

- Physical conditions and surroundings
- Working patterns, location and any flexibility around these

2. CREATING OR AMENDING THE JOB DESCRIPTION

The job description reflects what the post holder does and what they are responsible for. It should provide an accurate and comprehensive summary of the job, its purpose, and main duties and responsibilities. The information in the job description informs the development of the person specification.

It is important to ensure the following when writing or reviewing job descriptions:

- Language used should be neutral and non-discriminatory;
- Equality dimensions should be considered, e.g. what flexible working arrangements could be put in place to encourage a diverse pool of job applicants.
- Sufficient detail should be included to allow potential job applicants to understand the requirements of the job.

The job description includes:

Purpose of the job:

- try to capture this in one or two sentences.

Responsibilities:

- summarise what the post holder is responsible for, e.g. people, budgets, other resources.

Main tasks:

- be precise
- avoid vague terminology
- use active verbs to start each bullet point
- reflect the outputs of the job / what the post holder is expected to produce (eg delivering projects. achieving KPIs)

Scope of job:

- convey the importance of the job
- reflect the breadth of impact of the job

Organisational Values / School Ethos

The Job Description presents the opportunity to highlight the importance of EA's/the school's Values/ethos and how this influences how we go about our work. This may be reflected in the terminology used throughout the Job Description, and/or by including a specific reference to the Values/ethos under the "Main Duties and Responsibilities" heading, i.e.:

- To promote and adhere to the values/ethos of the Education Authority/School

3. CREATING OR AMENDING THE PERSON SPECIFICATION

The person specification sets out the *attributes required of the post holder* to adequately perform in the job. These requirements will form the criteria to be used in the recruitment process. **Therefore the person specification is a critically important document as it is the basis upon which selection decisions are made.**

The person specification should be derived from the job description and should describe the essential qualifications, knowledge, experience, skills and personal qualities that are necessary for successful performance in the job.

The person specification should be sufficiently comprehensive to convey the requirements of the post holder without becoming unwieldy. The typical number of selection criteria might be 4-5 for basic grade posts and perhaps 6-8 for management or leadership roles, but this will vary from job to job. When setting the criteria, it is helpful to think about how these will be assessed in the recruitment process.

Selection criteria should be:

Justifiable	<ul style="list-style-type: none"> • All criteria should be directly relevant to the job description.
Measurable	<ul style="list-style-type: none"> • It must be possible to determine whether a job applicant does or does not meet the requirements.
Independent	<ul style="list-style-type: none"> • Criteria should not be listed more than once and they should not overlap. Try to group similar criteria together.
Specific	<ul style="list-style-type: none"> • Criteria should be clearly and unambiguously written to ensure consistent understanding by job applicants and panel members.

Organisational Values / School Ethos

The Person Specification presents the opportunity to highlight the importance of EA's/the school's Values/ethos and how this influences how we go about our work. This may be reflected in the terminology used throughout the Person Specification, and by including "Values Orientation" or "Identification with School Ethos" section within the essential criteria.

Worked examples are available to download from the recruitment information webpage.

4. IMPORTANT EQUALITY/DISCRIMINATION CONSIDERATIONS

Consider whether the job criteria could directly or disproportionately exclude people who possess certain equality characteristics, or might discourage such people from applying when they could be suitably qualified to do so. The criteria need to be objectively justifiable to avoid unlawful discrimination.

Qualifications

Consider if qualifications are necessary or whether experience would be adequate. For example, some people with disabilities may have had their education interrupted because of their disability. This does not mean that they are less capable of doing the job.

Indicate that qualification equivalents are acceptable. Accepting only UK based qualifications would exclude potentially talented and acceptably qualified job applicants from outside of the UK, or those who may have been educated elsewhere.

Experience

Consider if experience is genuinely required for the job, or whether training could be provided. People who have been out of the workplace for a period of time may not have been able to gain work related experience e.g. people caring for dependants.

Consider whether experience at a particular level is required e.g. “supervisory”, “management”, “senior management”. This could be a justifiable requirement, however note that some groups may be under-represented in management and senior level roles, e.g. women, disabled people, certain ethnic groups, or younger people. Where a particular level of experience is sought, it is good practice to define how this will be interpreted by the selection panel.

Exercise care in expressing the length of time any experience should cover, and keep this to a minimum. For example, asking for a certain number of years post qualification experience could favour older job applicants.

Avoid stipulating that experience should be within a particular time period, unless this is justifiable. For example, asking for 3 years’ experience within the last 5 years could rule out women who have been on maternity leave, or people who have taken time away from the workplace to care for dependants.

Requirement to be flexible or to travel/drive

Setting traditional working patterns, or specific work locations could discourage job applicants and limit the applicant pool. While these may be a genuine requirement for some jobs, EA is a large regional organisation and therefore consideration should be given to the feasibility of alternative, flexible working arrangements and patterns.

Stating that applicants must be flexible or be prepared to work late/long hours could, for example, disadvantage job applicants who having caring responsibilities. These should only be included if they are genuine requirements for the job.

Requirements to hold a driving licence / car may exclude some disabled people. Using this as a selection criterion, as well as how it is articulated needs to be carefully considered. EA uses a standard form of wording that allows applicants to meet this criterion in different ways, i.e.,

- Have access to a suitable vehicle (appropriately maintained and insured for Education Authority business) that will enable you to carry out the mobility requirements of the post in an efficient and effective manner;

OR

- Provide sufficient information to satisfy the employer that you have access to an appropriate alternative form of transport that will enable you to carry out the mobility requirements of the post in an efficient and effective manner.

Requirement for specific age / gender / physical characteristics

Criteria that relate to physical characteristics (e.g. physical fitness) could potentially exclude some older or disabled people. Such criteria should not be used unless they can be objectively justified. The organisation's obligation to make reasonable adjustments for disabled people must also be considered.

If a job has a physical component (e.g. driving, heavy lifting, working at heights etc.), describe that clearly in the job description so that disabled job applicants can assess whether reasonable adjustments to the role might be possible.

Few jobs can justify setting an age or gender specific criterion, and where this is an essential requirement of the job it may be regarded as a Genuine Occupational Requirement. In such cases advice should be sought from the HR Recruiter.

Language and Terminology

Use of words that could be interpreted as targeting a younger job market should be avoided, e.g., 'dynamic', 'energetic', 'youthful enthusiasm'. Such terminology is vague and difficult to justify, and could discourage older people from applying.

Setting a criterion for a 'recent graduate' may be difficult to justify, and would exclude people over 22 or 23 years of age.

Hiring Managers should detail the criteria to be used for recruitment purposes in the Job Description / Person Specification. The information in this document will be communicated to job applicants.

Once the job posting has gone live, selection criteria must not be changed. Any changes required after the job has been advertised would require the competition to be cancelled and re-commenced.

5. CREATING CRITERIA THAT ARE MEASURABLE

It is important to invest time in ensuring the criteria in the person specification are clear and unambiguous. This will make it easier for job applicants to understand the requirements of the job and therefore explain how they meet those. Clearly expressed criteria will also minimise potential problems with interpretation by the selection panel when shortlisting and at the interview stage

Where possible, avoid the use of phrases like "relevant experience", as interpretations could differ. Try to be more precise about the type of experience sought, or define what is acceptable as 'relevant experience'. Using terminology from the job description could help with this.

It may be appropriate to provide a definition of some other terms used, e.g. "senior level".

Criteria should be divided into essential and desirable, where used.

Some criteria will be more easily measured such as holding a qualification, or having a certain length of experience. Other criteria will need to be carefully worded to draw out elements that may be

assessed and therefore measured. For example: A requirement for ‘good team working skills’ might be articulated as follows:

“Demonstrable experience of collaborating and contributing in a team environment to achieve team goals”

This form of wording will direct applicants to demonstrate how they meet the criterion.

When shortlisting, panel members will be able to measure the strength of a response by looking for evidence of collaboration, and of making a contribution to a team to help achieve team goals.

Other useful forms of wording include:

- Proven ability to
- Evidence of having achieved
- Demonstrable knowledge of

Where experience being sought is multi-faceted, it may be clearer to group the requirements, e.g.:

A minimum of 1 years’ experience in a challenging administrative support role, with evidence of experience in:

1. Providing high quality administrative support to managers / teaching staff.
2. Producing regular management information for a Board or Management Committee.

6. WHICH CRITERIA WILL YOU MEASURE?

Having reviewed the person specification document and identified the criteria to be used in the recruitment process, the Hiring Manager should then decide which criteria will be measured at shortlisting and which will be measured at interview (or by other means).

Qualifications and experience will always be assessed from the application form at the shortlisting stage. Careful articulation of other criteria will make it possible to apply additional criteria at shortlisting to reduce the number of applicants progressing to interview, and to help ensure that those progressing to the next stage reflect the highest quality of applicants (based on their completed applications).

The Hiring Manager should detail the method of assessment on the Person Specification.

Where multiple desirable criteria have been set, these should be listed in order of importance on the Person Specification (with 1 being the most important). This will give the selection panel the flexibility at the shortlisting stage to apply one, more, or all of the desirable criteria in priority order to shortlist a manageable applicant pool.

Remember, once the criteria have been set and agreed by the Hiring Manager and the job posting has gone live, the criteria must not be changed.

7. OTHER PRE-RECRUITMENT ACTIONS AND REQUIREMENTS

LONGER TERM PLANNING AND GUIDANCE ON THE ESTABLISHMENT OF RESERVE LISTS

Before embarking on a recruitment exercise, it can be beneficial to consider wider/future resourcing needs with a view to maximising the use of time and resources. For example, it may be possible to recruit multiple posts from one recruitment competition, phasing start dates, or by creating a reserve list from which future appointments may be made.

Generic job descriptions are available for some headquarters roles and for most teaching and non-teaching school-based posts. These present an opportunity to establish reserve lists for similar roles, thereby reducing the recruitment workload of the Managers, Principals and Governors involved. However, it is important to think this through at the recruitment planning stage. Some points for consideration are as follows:

- As generic job descriptions are in place for many posts, particularly school-based posts, this presents a good opportunity to maintain reserve lists for future vacancies and for frequently recruited posts with the same job description and salary scale.
- Carefully consider the essential criteria being included for a post. The person specification needs to be sufficiently comprehensive to convey the requirements of the role, justifiable and specific to the job. Consider if it is possible to keep the criteria at a sufficiently broad level so that the recruitment exercise could be used to fill substantially similar future posts. For example, could the essential experience requirements for a teaching post request experience at a specified Key Stage, as opposed to seeking experience of P1, P2 etc. It is not expected that this would be to the detriment of the post currently being recruited. If the post has a requirement which is justifiable and needed for the role then it should be included.
- If you anticipate that you may wish to retain a reserve list then also consider providing information to that effect in the advertisement. This helps with openness and transparency, for example: *The order of merit list arising from this recruitment exercise may also be used to fill other broadly similar vacancies which arise within the next 12 months.*
- It is generally accepted practice in terms of equality of opportunity that reserve lists should not be retained for longer than 12 months unless there is strong and objective justification to do so. The requirement to retain the reserve list for the full 12 months is not set in stone. This could be reduced, for example to align with the academic year. Either way, the period for which the reserve list will be retained should be determined at the outset and communicated to applicants in the advertisement and in relevant applicant correspondence.
- Accepted practice is for a reserve list to only apply to posts with comparable terms of appointment. For example, it would not usually be recommended that a reserve candidate who has applied for a fixed-term post would be offered a permanent post unless this had been stipulated in the advertisement. A useful question to ask can be is it likely that the applicant pool would have been different had the post been advertised as?

The Hiring Manager may wish to seek the advice of the HR Recruiter to help determine the best approach.

JOB EVALUATION

Where a new job is being created, the Hiring Manager is responsible for preparing the job description and person specification, and for ensuring that the post has been job evaluated to determine the grade and salary for the role. Guidance is available from your HR Business Partner.

If fundamental changes are being made to an existing job description (e.g. the scope of the role, or responsibilities of the post holder), the Hiring Manager should determine whether a new job evaluation exercise is required and ensure this is completed.

Where job evaluation is required, the recruitment process cannot commence until the job evaluation exercise has been completed.

ORGANISATIONAL STRUCTURE

The Hiring Manager is responsible for ensuring that the post is funded and within the agreed headcount/full time equivalent, that it is not replacing a redundant or suppressed post (unless permission has been granted), and that it has been approved by the necessary signing authorities.

Where the organisation is going through a period of change, the Hiring Manager should engage with their HR Business Partner at an early stage to consider ongoing internal changes and wider organisational planning, for example, to support successful restructuring and to facilitate opportunities for existing staff.

SELECTION APPROACHES

Selection methods must be based on the job description and person specification, with the objective of establishing candidates' ability to do the job. Different approaches may be used to help achieve this, which could involve a number of different stages and/or a combination of approaches. Information on a range of assessment methods is outlined under the Interviewing Stage, Methods of Assessment.

The HR Recruiter can advise the Hiring Manager on the suitability of these tools for different types and levels of roles, how they could be integrated into the selection process, and, where relevant, any costs involved.

8. ESSENTIAL EARLY PLANNING

The Hiring Manager is responsible for undertaking the necessary planning to support the smooth running of the recruitment process, and to ensure the best possible candidate experience. This includes:

Selection Panel

- Confirming selection panel members.
- Ensuring panel members have been appropriately trained.
- Confirming diary dates for panel shortlisting and interviews. Interview dates will be published when the job is advertised.

Logistics

- Booking rooms for interviews and shortlisting.
- Making arrangement for any requirement for additional resources e.g.
- Materials for presentation preparation.
- Refreshments.

Administrative Support

- Making arrangements for greeting and directing candidates, e.g.:
- Welcoming candidates on arrival.
- In consultation with the HR Recruiter, facilitating any special arrangements for candidates that have requested support.
- Checking any required documentation, e.g. checking photographic identification.
- Directing candidates to the relevant room/s.
- Managing the timing and control of additional selection processes, e.g. presentation preparation.
- Directing candidates at the end of their interview.