



Guide to running a good recruitment process

Good practice and practical advice for UK
churches and Christian charities

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Introduction

Good recruitment is crucial for every organisation and church

The aim of recruitment is to get the right person for the job at the right time. But it's more than that. Filling a current vacancy is one thing, but finding and keeping the right number of staff with the relevant skills and abilities for current and future needs is also vital. The recruitment process should not be rushed, and those involved should have the appropriate knowledge and skills.

This guide is designed to help UK Christian organisations and churches understand and think through the different stages of the recruitment process. It also addresses how UK law impacts recruitment activities in the Christian sector. The importance of fair recruitment should not be underestimated. Monitoring your recruitment processes to ensure that they fulfil equal opportunities legislation, and are non-discriminatory, is imperative. But good practice in recruitment and selection need not be difficult. Yes, it takes time and effort, but the benefits are worth it.

Discrimination alert

It is important to bear in mind that you should not discriminate on grounds of any of the protected characteristics (age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion and belief, sex (gender), and sexual orientation) throughout the entire recruitment process. This includes when writing the job description and person specification, shortlisting, interviewing, offering a job, and agreeing terms and conditions. Everyone taking part in such activities should be aware of relevant legislation and the importance of avoiding discrimination. Throughout this guide any discrimination issues to consider will be raised at appropriate points.

However, the Equality Act does allow an employer to require a job applicant or employee to have a particular protected characteristic when it is *genuinely* needed for the job, known as an '**occupational requirement**'. The requirement must be crucial to the post, not just one of several important factors. Where an occupational requirement applies, the employer is required to ensure that imposing the requirement is objectively justifiable.

There is a particular challenge facing Christian organisations and churches when seeking to recruit new staff members who share their beliefs. Some think that because they are a Christian organisation they can simply state in their job adverts that *any* role they are advertising for has an occupational requirement that the jobholder is a committed Christian - without giving it any further thought. **That is not enough.**

The key question to consider is this: *what are the circumstances where a church or Christian organisation can **legitimately** assert in a recruitment exercise that the post-holder must be a Christian?* See [The Equality Act – Occupational Requirement - http://bit.ly/2WvkK3i](http://bit.ly/2WvkK3i) for helpful information from Mark Mason (employment lawyer) on this subject.

Helpful resources

Throughout this guide there are links to standard templates and proforma, further guidance, blog posts, factsheets, e-learning and other e-tools, all free to access and also listed at the end of the document.



STEP ONE: Working out whether you really need to recruit



A staff member has just handed in their notice, your church is growing and you would like to strengthen the youth work, or your organisation has a new area of ministry you would like to move into. It's a good idea before just pressing ahead with a recruitment process to take some time to stand back and look at your organisation / church, your staffing needs, and plan ahead.

What is really needed?

Could these needs be met by a reallocation of duties amongst the existing staff team? Would training or developing of current staff meet the needs? Or do you really need to establish a new role (full or part-time) in order to meet your needs?

How long-term is the post likely to be?

Is this a temporary post (such as might be needed right at the start of a new project), or do you envisage something longer term? (Think carefully about this as it is harder, generally, to recruit for temporary rather than permanent posts. And ensure that you are familiar with the law regarding [temporary / fixed-term contracts](https://www.gov.uk/fixed-term-contracts) - <https://www.gov.uk/fixed-term-contracts>.)

What new skills or specific duties are required?

Get these clearly thought out before starting by doing some job analysis.

STEP TWO: Job analysis



Is this an identical role, a changed role, or a completely new role that needs filling?

Firstly, you need to spend time gathering information about the job and what the requirements actually are:

- If you are simply recruiting for a replacement for a current role, start by taking a good look at the current job description. Does it need updating in any way? Have the job requirements changed? Have the aims of the role changed? Are there new skills that are needed?
- If it is a completely new role, what exactly are your requirements?

You need to consider the main purpose of the job and how the job fits into the existing team / structure of your organisation / church.

You then need to think about the main activities or duties of the role (the 'outputs' - this will make up the job description), and the knowledge, skills, abilities and autonomy that jobholders will need to do them (which will form the basis of the person specification) - we go into detail on these in the next section.

It is also important to consider how fulfilling and motivating this role would be for the postholder, as well as any opportunities you might be able to offer for them to develop skills and progress. In addition, do consider whether the job you are designing is likely to lead to a sustainable and healthy workload.

Once you have done this basic analysis it is a good idea to present your results to managers and to other similar jobholders as well (if there are any), to ensure your analysis is accurate and that you haven't missed anything important.

It is also important to consider flexibility at this stage – if you are able to be open to flexible working or potential job-sharing, you may well open up the vacancy to more people.

Using your job analysis information, you can then move to the next stage.

Who should be involved?

Ideally, you would have the same people meeting together (at least) three times during the recruitment and selection process to form a panel to:

- draft the job description and person specification, and agree the content of an advert
- shortlist the applications
- run the interview and assessments, and make an appointment / a job offer

In a larger organisation the panel would ideally include the line manager the successful candidate will report to, others who are trained to interview job candidates (if at all possible), and a member of the HR dept (if your organisation has one).

STEP TWO: Job analysis

In a smaller organisation, bring together the person who will have responsibility for managing the new staff member, someone who can oversee the process from an HR point of view, and possibly the overall Director or a more senior manager.

In a church setting, there are a number of people and key stakeholders who could be involved - the person who will have responsibility for managing the successful candidate, representative(s) from the church leadership team and/or from the specific ministry area that the new person will be working in, and it would be helpful if someone from the staff or congregation who has knowledge of HR issues or interviewing skills is included or involved in some way. The key here is to get a small team who can oversee the process, but then to involve appropriate others as and when necessary.

If it's not possible for the same people to meet each time, at the very least have one person who can play an active role at every stage and be the constant throughout the process.

Helpful resources

Including a factsheet from CIPD on Job Design.



STEP THREE: Essential documents



Once you have completed your job analysis, you can start work on the essential documents ready for recruitment. These documents are the job description, person specification, job application form, and information about your church / organisation. If these can be provided all together in one 'pack' for the applicants, it will help in making the recruitment process go smoothly.

1. The job description

The job description should clearly describe the job - including its main purpose, key tasks, and how it fits into the existing structure.

A good job description lays a foundation for writing the person specification, allows potential candidates to work out whether (or not) the role is actually suitable for them, and also helps with performance management.

How to write a job description

- **The main purpose of the job** – ask yourself, what is the job intended to achieve? Aim to outline this in one or two sentences maximum, summarising the overall purpose of the job in an attractive but clear and factual way.
- **Main tasks** – clearly list the main duties of the post and also the results that are expected. Be specific, and do mention the boring bits! It will either help people de-select themselves – or prepare them for what is really in store when they arrive.
- **The extent of the job** – give more information about how important the job is and how it fits into the overall purpose of your organisation/church, as well as any further duties and responsibilities.

Discrimination alert

When putting together the job description be careful not to inadvertently discriminate. For example:

- If you are asking for a particular gender is that an essential and justified requirement of the role, rather than a mere preference?
- Because it is unlawful to discriminate against someone because they hold (or do not hold) a particular religious belief, you should avoid asserting that a post-holder must be a Christian unless it is clearly justified in your job description. (See [How should we go about recruitment and selection - http://bit.ly/31EEZ34](http://bit.ly/31EEZ34) by Mark Mason for a suggested recruitment procedure for an organisation with a Christian ethos.)
- If you cannot assert that the postholder must be a Christian, be careful that you don't include criteria that make it harder for people who aren't Christians to meet them - unless they can be clearly justified.
- Does the job definitely need to be a full-time role or could it be two part-time roles/a job share?

STEP THREE: Essential documents

2. The person specification

The person specification is just as important as the job description, but is different.

What is the point of a person specification?

- Whilst a job description outlines the main *tasks*, the person specification outlines the main *qualities* which the person will need in order to do those tasks well. It is basically a picture of the ideal person for the role.
- The person specification is crucial - you are most likely to get the best person for the job when your initial shortlisting is based primarily on the person specification. (And if so, make this clear in your paperwork, for instance, "the following specification of essential and desirable attributes will guide the selection panel in their shortlisting - applicants should address their application to these".)
- The person specification also enables potential candidates to work out whether (or not) the role is actually suitable for them to apply for.
- The person specification provides clear criteria to help those who will shortlist the applications.

How to write a person specification

The person specification should be written after the job description.

Split the person specification up into main areas: (but do note that these can be termed or structured differently if you wish*):

- **Skills and abilities** – for example 'good oral and written communication skills' or 'strong research and analytical skills'.
- **Knowledge and education** - include only *necessary* professional or academic qualifications for the role, for example 'CIPD qualified', or 'knowledge of and competency in Microsoft products, especially Office 2010'.
- **Relevant experience** – for example 'previous office and administrative experience', or 'experience of contributing to the development of HR Policies and Procedures'.
- **Personal qualities / other attributes / aptitudes** – for example, 'diplomatic skills and tact', 'self-motivated'.

*For example, other suggestions include:

- Qualification, experience, skills, knowledge, competencies
- Qualifications and experience, skills and knowledge, personal qualities, special conditions

Person specification criteria must be:

- **Relevant** - you should be able to see a direct connection between what is on the person specification and the duties outlined in the job description.
- **Justified** - can you objectively justify your reason for the requirement? Is a particular qualification really necessary, or is experience just as relevant? Be careful not to include criteria beyond those really necessary to do the job – it might rule out otherwise suitable candidates.
- **Measurable** – you need to be able to test or measure the criteria in some way. Some things such as enthusiasm, attitude, etc. are difficult to measure.
- **Non-discriminatory** - be conscious of both direct and indirect discrimination (see examples in 'Discrimination alert').

But don't have more criteria than necessary - you might end up restricting the pool of suitable candidates.

STEP THREE: Essential documents

Once you have decided on your criteria you then need to decide if they are essential or desirable - but take care to avoid listing requirements as essential if they are not actually essential, as this adds to the potential for discrimination.

- *Essential* criteria are those attributes or qualifications without which a person would be unable to adequately perform the job. Anyone who does not meet these requirements can be ruled out straight away.
- *Desirable* criteria include anything that is not essential but that contributes significantly to effective performance. Anyone who meets these criteria is likely to be able to do the job better. Desirable criteria can help you choose between good candidates who all meet the essential criteria.

Finally, you need to think about how the items in the person specification can be measured and tested. There are some key ways you can do this, and it is helpful to think of measuring each aspect in more than one way if at all possible. Suggested areas are as follows:

A = application form **I** = interview **T** = test or exercise **P** = presentation

It is helpful for candidates applying for the position if the way you will be measuring the criteria is flagged up in the person specification. For example, by adding in the initials at the end of each description: "Excellent written and verbal communication skills, including writing for and understanding different audiences and channels" (A), (P), (T)

Discrimination alert

When writing the job description and person specification, be aware of possible pitfalls:

Sexual discrimination

- The job title you use should *not* be gender specific — for example, 'waitress', 'salesman', 'manageress' and 'Headmaster' should be avoided. If you wish to include something gender specific in the job title you *must* have a clearly justifiable reason for doing so (see below).

Racial discrimination

- Where language is an important part of the role you must state that someone must be able to speak the language rather than being from a particular country, for example 'Italian speaking' rather than 'Italian'.

Age discrimination

- Avoid words such as 'youthful', 'mature' or 'recent graduate'. All these terms could be seen as excluding someone from applying for a role based on their age.
- Asking for a certain level or length of experience from candidates could be deemed as discriminating against someone who hasn't had the opportunity to gain that experience as they are too young. There are other ways of rephrasing this, such as asking for candidates who have demonstrated experience in a certain task.

Disability discrimination

- Some jobs do have physical requirements which are essential (for example, firefighters have various physical fitness tests to pass), but you must ensure it is a genuine requirement for the role rather than something which is 'nice to have'.

Discrimination on grounds of religion or belief

- It is unlawful to discriminate against someone because they hold (or do not hold) a particular religious belief. You should avoid asserting that a post-holder must be a Christian in your advertising unless it is clearly justified in your job description and person specification. ((See [How should we go about recruitment and selection - http://bit.ly/31EEZ34](http://bit.ly/31EEZ34) by Mark Mason for a suggested recruitment procedure for an organisation with a Christian ethos.)

STEP THREE: Essential documents (continued)

From XpertHR (<http://bit.ly/2F7qTgW>) **Are there any circumstances in which an employer can specify, for example, the required race, gender, sexual orientation or age of job applicants?** There are certain defined exceptions in the Equality Act 2010, known as occupational requirements. These, broadly, apply when a job can be performed effectively only by someone with a particular protected characteristic, eg either a man or a woman, a person of a specific racial or religious group, a person of a particular sexual orientation, a disabled person or a person of a particular age group. To rely on the exception, the employer must show that, having regard to the nature or context of the work, having the particular protected characteristic is an occupational requirement and that the application of the requirement is a proportionate means of achieving a legitimate aim. For example, the Equality and Human Rights Commission, in the Employment statutory code of practice (<http://bit.ly/2F8a2dX>) states that "a women's refuge which lawfully provides services to women only can apply a requirement for all members of its staff to be women".

3. The application form

The two main ways in which applications are likely to be received are as a Curriculum Vitae / Resume (often with an accompanying letter of application) or an application form (although there is also a growing use of LinkedIn in recruitment these days).

CVs / Resumes or LinkedIn profiles

The advantage of CVs or LinkedIn profiles for the individual is that they are not restricted to a standard format and they can choose to present themselves in their own way, allowing more flexibility and creativity. They can also use the same (or similar) profile for multiple jobs. However, the major limitation in using these formats is that it is very difficult for those shortlisting to consistently rate candidates alongside each other when their CVs / profiles look so different.

Application forms

The main advantage of an application form is that it allows information to be presented in a consistent format by each candidate. A standard form makes it easier to collect relevant information from applicants in a systematic way. Those involved in shortlisting can then objectively and consistently assess each candidate's suitability for the job, comparing the information provided against the person specification and job description, thus allowing candidates to compete on equal terms. It also encourages those involved in shortlisting to focus on relevant evidence and helps with sifting out unsuitable candidates. (It can also be used as a basis for the interview.)

For these reasons we encourage the use of standard application forms in recruitment.

Application forms should be appropriate to the level of the role, and ask only for information relevant to the job including:

- **Information about the applicant:** basic biographical details, their current and previous employment / paid or voluntary work experience and notice requirements.
- **Skills and knowledge:** education and training, professional or technical qualifications, training and development (non-qualification courses that support the application or on-the-job training that has been undertaken).
- **Personal statement:** a section that allows candidates to explain how they meet the requirements of the job description and person specification (it will make shortlisting much easier if this section uses the same headings as those used in the person specification).
- **References:** you will probably want to ask for two types of reference: a professional reference (usually from a current employer or manager) and a character or personal reference (this needs to come from an independent person, who knows the candidate well). When the job has an 'occupational requirement' that the postholder is a committed Christian, you may also wish to ask for a reference from a leader of the church the individual attends. Ensure you make it clear on the application form at what point in the recruitment process any references will be taken up, and ask applicants to indicate that they are happy for you to contact their referees at this point - you should only ask for references with the permission of the applicant.

STEP THREE: Essential documents

Practical details

- Keep the design, format and language of the application form clear and simple.
- All applications should be treated with confidentiality and only those who are involved in the recruitment process itself should see the applications.
- Ensure you have a clear recruitment privacy policy for all those involved in the process to adhere to throughout – in line with current Data Protection legislation. Share this policy with each candidate, so that they know how the details of their application are to be kept, for what purposes and for how long.
- Make sure you promptly acknowledge each application - it is good practice and also presents a positive image of your church / organisation. It is important to remember that at each stage of the recruitment process applicants are building up a picture of your organisation or church and whether or not you are the kind of organisation they would like to work for.

Discrimination alert

- Allowing candidates to choose whether they fill in the form in their own handwriting or type on an electronic version is important so as not to discriminate against those with disabilities that affect writing ability, or applicants whose first language is not English.
- It will usually be unlawful to ask [health-related questions \(http://bit.ly/2WFpB7z\)](http://bit.ly/2WFpB7z) at the application stage.
- You will reduce the risk of discrimination if you separate personal information from the rest of the application for those involved in the shortlisting stage, so that they can shortlist 'blind' to reduce the chance of bias.

4. Information about the organisation/employer

It is a good idea to prepare some general information about your organisation / church to send to potential applicants. This is a great opportunity to share your vision with them, and to give them an understanding of who you are and what you do. Do also include links to your website and social media accounts if appropriate.

For larger organisations you may also wish to include details of the department or office in which the job is located, and any other information related to the needs of applicants.

If there are additional documents that applicants need to see before they apply, include these in your application 'pack'.

Helpful resources

Including sample documents and templates, and information about data protection and HR records.



STEP FOUR: Attracting applicants



How and where to advertise

When advertising a job you want to be drawing in good candidates with the necessary skills and abilities, attracting a decent number of applicants, and ultimately appointing the best person for the role. To avoid choosing from too narrow a field, there are a number of ways to generate interest from potential candidates.

But firstly, don't overlook your own internal 'talent pool' – to keep your best staff you want to be providing opportunities for development and/or career progression within your organisation/church. The best candidate *might* be an existing employee. But do make sure you handle all applications – internal and external – in exactly the same way, so as to avoid allegations of favouritism or discrimination.

Pick *at least two* advertising methods from the following (depending on the type and level of job):

- The internet - this is increasingly the primary route for people to look for and advertise new jobs. It can range from simply advertising your vacancy through to handling the entire recruitment process online. Internet recruitment tools include online recruitment websites (for example, Christian Vocations - www.globalconnections.org.uk/vocations/uk-jobs), but also your own website, and your own social media accounts if you have them (asking your followers to help with sharing and/or retweeting).
- Local churches (sending a short version of your advert for their notice sheets, noticeboards and e-bulletins).
- The Christian press (printed magazines or newspapers).
- Local newspapers.

Some organisations use recruitment agencies to help with their recruitment. If you do so, just make sure that they have a very good understanding of your organisation and its requirements before they start advertising.

Labour market conditions

Don't assume that there will be a steady stream of candidates for the position you are advertising!

There are some factors and shortages which might affect successful recruitment. For instance, our impression is that there has been, at times, a shortage of Christian youth and children's workers. And there is no doubt that requiring candidates to raise their own financial support will significantly narrow the field of candidates who apply. So you might need to make more of an effort to attract suitable candidates – for instance offering good training opportunities, flexible working, part-time work / job shares, career development programmes etc. or even just ensuring that you clearly articulate your vision to attract those who would share it. It's also a good idea to give some time to finding out salaries for comparable roles so that you are pitching yours at about the right level compared to others in the same sector (and note that you must at least comply with [National Minimum Wage](http://www.gov.uk/national-minimum-wage-rates) rates (www.gov.uk/national-minimum-wage-rates).

STEP FOUR: Attracting applicants

Practical details

Before you advertise ensure you have the following in place:

- Clarity as to how applicants should respond to the advert – if there is an application form to fill in, how this should be returned (email/online/post) etc.
- Someone to respond to applicants – acknowledging emails and applications, sending further details, responding to queries promptly.
- Someone as a point of contact should candidates wish to have an informal chat or visit before submitting an application.
- At least two people to sift applications and shortlist – ensuring they are aware of how to do this properly.
- Plans for the next steps in the process – a date for interviews (with any necessary/appropriate practical or written tests) and people in place to run these.
- Clear guidelines for the handling and storage of personal information for all those involved.

Remember that (unless you are a visa sponsoring organisation and can apply for visas for those needing them), you have a responsibility to check that applicants have the right to work in the UK.

Discrimination alert

- Be careful about spreading news of vacancies only through existing staff. This is more likely to bring in a limited pool of candidates and (unless it is a very niche role) is less likely to get the best possible candidates. In terms of Equal Opportunities requirements it could be lacking too – the Equality and Human Rights Commission warns against this practice if the workforce is predominantly one sex or racial group.
- If you are advertising a job that can be done by non-Christians (that is, there is no occupational requirement that the postholder is a committed Christian), be careful that you don't *only* advertise through Christian channels. This could be seen as indirect discrimination.

Writing a job advert

Your overall aim should be to ensure the advert is eye-catching, conveys something of the image of your church / organisation, is brief, and is easily understood.

- Include the job title and the main aspects of the role (from the job description).
- If there is room then include some of the skills, knowledge and qualities that are essential for the post (reflecting the contents of the person specification).
- Include brief information on pay, location, and length of contract (e.g. permanent or temporary).
- Give basic but interesting (or even inspiring) information about your church / organisation (you could then link through to your website or a separate document for a fuller description).
- Give a clear closing date and brief instructions as to how to apply.
- Include a contact name, email and/or phone number for people to contact should they have additional questions.
- Within this, be warm, creative and a bit informal if you wish!
- For examples of different job adverts, see [Christian Vocations](http://www.globalconnections.org.uk/vocations/uk-jobs) UK jobs pages: www.globalconnections.org.uk/vocations/uk-jobs. **Note:** we cannot guarantee that the individual adverts on these pages meet all the above requirements.

STEP FOUR: Attracting applicants

Practical issues

- Those who are interested need to receive some written material from you (further particulars or an application pack of some kind).
- This will normally include further information about the organisation/church, an application form, the job description and the person specification.
- You can either make these documents available online for candidates to download, or make it clear to candidates who they should contact to request these.
- You may like to consider putting together in one document some further brief information about your church or organisation, and any other information relevant to the needs of the applicants. This is a good opportunity to inspire candidates about who you are and why they might want to consider working with you.
- Links to your website and / or social media accounts will also help candidates to build up a fuller picture.

Discrimination alert

- Check that the advert avoids using any wording that might be viewed as discriminatory or open to legal challenge - apart from very limited and lawful exemptions and exceptions you must not discriminate on the grounds of age, disability, gender reassignment, marriage and civil partnership, pregnancy or maternity, race, religion or belief, sex (gender) and sexual orientation.
- The job title you use should *not* be gender specific — 'waitress', 'salesman', 'manageress' and 'Headmaster' should be avoided. If you wish to include something gender specific in the job title you *must* have a clearly justifiable reason for doing so (and this needs checking carefully).
- Where language is an important part of the role you must state that someone must be able to communicate in the language rather than being from a particular country, for example 'Italian speaking' rather than 'Italian'.
- Avoid words such as 'youthful', 'mature' or 'recent graduate'. All these terms could be seen as excluding someone from applying for a role based on their age.
- Asking for a certain level or length of experience from candidates could be deemed as discriminating against someone who hasn't had the opportunity to gain that experience as they are too young. There are other ways of rephrasing a job advert, such as asking for candidates who have demonstrated experience in a certain task.
- Some jobs do have physical requirements which are essential (for example firefighters, or some acting roles), but you must ensure it is a genuine requirement for the role rather than something which is 'nice to have'.

Helpful resources

Including more detailed information on recruiting within the law.



STEP FIVE: Shortlisting and dealing with applications



There are two main parts to the selection process – shortlisting the applications and then assessing / interviewing the applicants to decide who should be offered the job. This section concentrates on the shortlisting aspect.

Principles

During the selection process you need to ensure that all candidates are treated fairly and without discrimination or bias – it is surprisingly easy to discriminate, consciously or unconsciously. Decisions at each stage should be based on objective criteria related to the job, and on the candidate's ability to perform the role, contribute to your organisation or church, and their potential for development. Other factors (such as previous knowledge of a candidate, their age or gender for example) if allowed into the discussions, might lead to bias or favouritism.

Shortlisting

Whatever means you choose for candidates to submit applications (an application form or CV for instance), you will have to sift them to choose which candidates to take further. Sifting and selecting should be carried out in a structured and systematic way to decide who best matches the requirements to go onto a shortlist for the next stage (whether that is an interview or another method). It is **much** easier for those shortlisting to concentrate on relevant evidence if a standard application form has been used for all applications.

Ideally the same people will meet for shortlisting as met initially for drafting the job description and person specification. If not, then have at least one person who can play an active role at every stage. This group will ideally include the line manager the successful candidate will report to, others who are trained to interview job candidates (if at all possible), and a member of the HR dept (if your organisation has one) or someone who understands HR issues if not. At the very least ensure that two or more people are involved.

Ensure that all those involved clearly understand the job and requirements and have the job description and person specification to hand when shortlisting. However, note that it is better if only the criteria in the person specification affect shortlisting decisions.

How to shortlist

Draw up a scoring scheme/matrix for all those involved to use:

- Base the scoring scheme on the items in the person specification.
- Some aspects of the person specification are more important than others, so, if you wish to, use a weighting to reflect their importance (e.g. x2 or x3).
- Choose a scoring system that works with the detail you are looking for e.g. from 0 to 3 or from 0 to 10 depending on how detailed you wish to be.
- Explain clearly what each score means so that those shortlisting are sure of what they are looking for (for example: 0 - fails to meet criteria, 1 - partly meets criteria, 2 - meets criteria, 3 - exceeds criteria).
- All those involved should be encouraged to use the full range of the scoring scale so that scores are not bunched together in a narrow range.

STEP FIVE: Shortlisting and dealing with applications

Ensure everyone involved knows what to do:

- Each person involved should go through the applications independently, and bring their individual scores to a shortlisting meeting.
- Score the applications one at a time.
- Assess applications in relation to the essential and desirable criteria as detailed in the person specification.
- Focus on the evidence presented related to the person specification (but have the job description to hand as well).
- Score based on the evidence given that the person meets the criteria. For example, it is not enough for someone to say 'I have experience of setting and managing budgets' – they need to explain how and give examples.
- Don't assess the candidates on your 'broad feeling' about them from their overall application. Score each of the criteria separately and carefully, based on clear evidence, looking for responses in the applications to each of the items from the person specification.
- Once scoring is complete, discard any applicants that score a '0' in one or more of the 'essential' criteria.
- Rank the remaining candidates in priority order, with the highest 'essential' criteria score first.

Making shortlisting decisions

- Arrange a meeting to compare scores and agree on ranking of candidates.
- If shortlisting is done carefully using the scoring methods as described above, the decision about who to invite to interview should become much more straightforward: just add up each persons' scores and the highest scoring candidates are invited.
- Where there is a noticeable difference in the scores reached, the selectors should discuss each in turn giving the reasons for their scoring, and come to a joint decision about who to invite in the light of the reasons given.
- If there are too many candidates to interview, consider the scoring of the 'desirable' criteria to help shortlist further.
- Agree on who to call for interview.
- Keep a copy of all the score sheets as evidence of how the selection panel accepted or rejected the candidates. This information is important and useful to enable your church / organisation to show that shortlisting has been done fairly. It will also prepare you for giving feedback to non-shortlisted candidates as to why and where they did not meet the criteria, and will be valuable if an unsuccessful candidate challenges the selection panel's decision.
- Make brief notes of the shortlisting meeting including notes on initial score comparisons, further score discussions (if undertaken), and any other points of discussion concerning the applications and reasons for inviting to interview (and not). Make brief notes for feedback to candidates on their individual applications - ready for if they request it.

STEP SIX: Interview and assessments



Final selection

The final selection needs to include appropriate methods to assess the candidates, guided by the job description and person specification. Don't just rely on one method (an interview, for example) for the final selection. There are a number of approaches that can be really helpful, such as:

- Tests or exercises of some kind – apparently the best indicator of future performance is some kind of ability test. If the person specification says you are looking for someone who has 'excellent written communication skills', then test these in some way. Or, if you are looking for someone with proofreading ability, then give them a proofreading exercise to complete.
- A presentation – if you are looking for someone who needs to be able to articulate your vision or some aspect of their work through oral presentations, then ask them to prepare a presentation.
- Group work – if you are looking to assess interpersonal, communication and/or problem-solving skills you might wish to set an activity for a group of candidates together. This can be a good way to observe how effectively candidates are able to work in a team.
- An interview – most job selection processes include an interview. More details about this are given below.

Note that it is best if you can measure each criteria of the person specification in **more than one way**, for example: **A** = application form, **I** = interview, **T** = test or exercise, and/or **P** = presentation.

Candidates who have been shortlisted should now be invited to attend the final part of the selection process.

The letter inviting candidates for final selection/interview should contain as much information as possible about what will be included:

- Explain how long the interview will last and who the members of the panel will be.
- Advise them what kind of other test(s) will be involved and the timings.
- If you wish candidates to prepare a presentation, give clear guidance in terms of subject matter, length, audio visuals or handouts required (or not), and what technology will be available.
- If you are going to require group work of some kind do let candidates know what this will involve.
- Send all applicants another copy of the job description and the person specification – just to ensure they all have these to hand.
- You should make it clear whether you will pay reasonable travel expenses for attending.
- Do let candidates know how you will manage this final selection process and how the selection panel will reach their decision on who to appoint.

Discrimination alert

- You must ask whether a candidate needs any 'reasonable adjustments' for the interview / final selection process, and you must consider making them. (The duty is to make adjustments that are reasonable. What is reasonable is dependent on factors such as the size of the organisation / church and the disruption likely to be caused by making the adjustment. It may not always be possible or reasonable to implement the necessary adjustments.) For example:
 - ◆ A candidate who is a wheelchair user will need an accessible room
 - ◆ A candidate with a hearing impairment may need to be able to see all members of the panel clearly so they can lip read
 - ◆ A candidate with dyslexia should be given extra time to complete certain tests

STEP SIX: Interview and assessments

The interview – some guidelines

- It is better for interviews to be handled by more than one person in order to prevent inadvertent or unconscious favouritism.
- If at all possible, provide the opportunity for those involved in interviewing to get some training – it has been shown that the outcomes of interviews are much more reliable when the interviewer(s) have had training.
- Follow a structured interview to help you score and compare candidates fairly - plan the questions carefully beforehand, ask all candidates the same questions, and use a standard scoring system for the answers.
- Prepare the questions using the person specification and job description so that you can draw out and focus on the skills, qualities, knowledge and experience essential to the role.
- However, don't be too rigid! You may find you have to probe further with some candidates to get enough information, so do allow freedom to ask follow-up questions if needed. But to prevent interviewees being asked vastly different questions, think through the types of follow-up questions that would be most appropriate.
- As past behaviour is one of the best predictors of future behaviour, ask your questions so that candidates describe things they have actually done or said in a previous situation, and the outcome of their actions. 'Tell us about a time when...' can be used to draw out previous actions or responses.
- Avoid closed questions that can be answered with a 'yes' or 'no'. Use 'what', 'when', 'why' or 'how' to frame more open questions.
- Choose a scoring system that works with the detail you are looking for e.g. from 0 to 3 or from 0 to 10 depending on how detailed you wish to be.
- Explain clearly what each score means so that those interviewing are sure of what they are looking for (for example: 0 - fails to meet criteria, 1 - partly meets criteria, 2 - meets criteria, 3 - exceeds criteria).
- Some questions in the interview are more important than others, so, if you wish to, use a weighting to reflect their importance (e.g. x2 or x3).
- Plan the interview so that the candidates do most of the talking.
- Listen well and make brief notes.
- Ensure interviewers are aware of relevant UK employment law.
- Interviews are not just opportunities to learn more about candidates; they are also opportunities to build rapport, and to help candidates learn more about the job and your organisation / church. Use the interview to talk positively about your organisation, but don't just talk about the positive aspects of the job – mention the boring or challenging bits as well! When candidates have a realistic understanding of the role, their expectations are more likely to be met and they are more likely to stay.
- At the end of the interview, allow time for candidates to ask any questions of their own and to raise any issues that are important to them.
- Finally, let candidates know what will happen next and when they can expect to hear from you regarding the outcome.
- **Note:** be careful that you don't give too much weight to the interview part of the process - it should be used alongside all the other elements to gain evidence for specific criteria, rather than being the 'final judgement' on the candidates.

Making a decision

- Being systematic in marking the candidates at the interview and in the tests will stand you in good stead when making decisions.
- As soon as possible after the final selection process those involved need to tally their individual scores for each candidate and make clear any notes they have made. Ensure all the evidence gained by the different methods is appropriately scored and brought together.
- Each member of the selection panel should rate the candidates in order of their score tallies (highest to lowest), remembering to make a note at this stage if candidates have low scores in any significant areas.

STEP SIX: Interview and assessments

Making a decision (continued)

- All those on the panel should then meet together for a 'wash-up meeting' to discuss their scores and any associated notes.
- Work out which candidate has the highest score overall and make a decision on the successful candidate based on all your findings.
- Where there is a noticeable difference in the scores reached, the panel should discuss each in turn giving the reasons for their scoring, and come to a joint decision about who to offer the job to in the light of the reasons given.
- It is also helpful to rate the rest of the candidates in descending order so that you have a reserve in case the first candidate decides not to accept the job.
- Keep a record of all the score sheets as evidence of how each member of the selection panel marked the candidates. This information is important and useful to enable your church / organisation to show that decisions have been made fairly. It also enables you to give feedback to unsuccessful candidates as to why and where they did - and did not - perform so well, and will be valuable if an unsuccessful candidate challenges the selection panel's decision.
- Make brief notes of the 'wash-up meeting' including notes on initial score comparisons, further score discussions (if undertaken), and any other points of discussion concerning the candidates and reasons for your final decisions. Make brief notes for feedback to unsuccessful candidates on their performance in the different parts of the process if requested by them.
- Keep all records and notes relating to the recruitment and selection process in case of query for a reasonable length of time using Data Protection legislation as your guide.
- When contacting candidates about the outcome of the final selection (more on that in the next section), be ready to offer feedback to unsuccessful candidates. Ensure you are well prepared, be clear and fair about what you want to say, and offer constructive suggestions for what can be improved.

Discrimination alert

- Your reasons for appointing or not appointing a candidate must be fair under Equality Law. If not, they could be challenged.
- Using standardised questions and scoring systems for all candidates is the best way to demonstrate that they are all evaluated the same way. In addition, research has shown that having standard interview questions has a huge positive effect on interview ratings.
- Do not ask personal questions that might be considered discriminatory, such as "Are you planning to start a family in the near future?" "Aren't you possibly a little old to cope with this job?" "Will the hours of the job clash with your family commitments?" or "Don't you think it would be difficult to do this job with your disability?"
- Avoid asking health-related questions unless they are clearly linked to the candidates ability to carry out something essential to the role, are related to taking positive action to help someone with a disability, or to check that the candidate has a disability if this is a genuine requirement of the job.
- Generally, questions directly about any of the protected characteristics (unless there is an 'occupational requirement' attached to the role) will be problematic, but questions that ask about a job requirement *may* relate to a characteristic and be acceptable, such as "Are there any adjustments we would need to make to accommodate your disability so that you can carry out XXXX function of the job?"
- If there are specific physical or medical requirements for the job this should be made clear in the job advert or other literature. Otherwise, it is unlawful to ask candidates medical questions or to require them to complete a medical questionnaire before offering a job.
- Avoid asking for personal views on issues irrelevant to the job.

Helpful resources

Including 'The 13 fatal errors of interviewing' and guidance for making good decisions.



STEP SEVEN: Final details



Offering a job

- Offer the job to your first choice candidate as soon as possible (at this stage this will often be done verbally).
- If the job offer is dependent on satisfactory character and / or professional references and other checks (such as DBS, checking the right to work in the UK, proof of qualifications etc.), clarify this again with the candidate and follow these up as soon as possible.
- If the candidate accepts, send out a job offer letter. If you have not already taken up references the letter should say that the job offer is made on condition of satisfactory references. Do note that offers of employment should always be made in writing – but **be aware that an initial verbal offer is as legally binding as a written one.**
- If the person declines the job, offer it to the next most successful candidate until someone accepts (or you run out of acceptable candidates).
- Once the job has been accepted inform all the other applicants that they have been unsuccessful.
- Offer to give feedback to unsuccessful candidates. If they take up your offer, give specific positive feedback in order to help them improve for their next job application / interview. Be prepared in advance, be clear and fair about what you want to say, and offer constructive suggestions for what can be improved.

Taking up references

- Any offer of employment is usually conditional on satisfactory pre-employment checks / references.
- Candidates should already be fully aware of how references will be used and when references will be followed up in the recruitment process.
- References are most commonly requested after the applicant has been given a 'provisional offer', although they could be taken up when candidates are invited to the final selection stage (as long as they are not referred to until after a final decision has been made – and then only by way of confirmation for the successful candidate).
- Prepare a standard reference request letter.
- References should contain factual information such as length of past employment, job title, brief details of responsibilities, overall performance and relevant qualities, time-keeping and reason for leaving. Do not ask for personal information about the candidate.
- Include the job description and person specification to give the referee full information about the job.
- References only provide a very limited perspective on a candidate's suitability for the role, so it is **not** advisable to base your recruitment decisions too much on references.

STEP SEVEN: Final details

Drawing up a contract

- A contract of employment is an agreement between an employer and employee and is the basis of the employment relationship.
- A contract 'starts' as soon as an offer of employment is accepted. Starting work proves that you accept the terms and conditions offered by the employer.
- It is best to put a contract in writing - it saves a lot of potential misunderstanding further down the line.
- Employees are legally entitled to a Written Statement of the main terms and conditions of employment within two calendar months of starting work. This should include the name of the employer and employee, start date and any probationary period, the job title, job location, working hours, pay/frequency of pay and any benefits, holiday entitlement, and details of any collective agreements that directly affect the conditions of employment.

New staff induction

And finally... you need to plan and prepare for the new arrival to give them the best possible start to their working life with you. Follow the link below to helpful resources to guide you as you do so.

Helpful resources

Including examples of job offer letters, contract templates, and an induction factsheet.



STEP EIGHT: Reviewing the recruitment process



Don't just heave a sigh of relief and move on...

Once you have completed your recruitment and selection, the final stage **must** be to review the process to assess how effective it was and what needs to change to make it better next time.

Here are some suggested questions to help you think through the issues:

- **Was it a well-structured process?** What worked well? What needs to be improved or changed? Were there any obvious omissions or glitches that you need to address for next time?
- **Did you get too many applicants? Too few?** Maybe you need to think about tailoring your advertisement and recruitment information more to get the result you wanted, or look to advertise in some additional places next time.
- **Were the applicants overqualified? Not qualified enough?** Try rewording your advert to attract more appropriate candidates. Using a clear job description and person specification can help. Make sure the qualifications you are asking for are appropriate to the role.
- **How cost-effective was your advertising?** A simple way to measure is to divide the cost (not only in money but in your time) by either the total number of applicants or the number of applicants that you considered seriously.
- **How did you do as an interviewer?** Maybe you can ask your new employee to critique you? (Once they have had a chance to get to know you and feel comfortable around you, so they feel able to be honest). Would it help to get further training in interview skills?
- **Were there questions you wanted to ask but didn't?** Provided the questions are job-related and not in violation of UK Equality Law, make a note and ask them next time.
- **Did your testing support or help you in your decision-making?** If not, maybe you should reconsider the kinds of tests you're administering (making sure they are legal and appropriate to the role).
- **Did everyone involved understand their obligations with regard to the safe keeping of documents and personal information of the applicants?** If not, what needs to change? How can you clarify expectations?
- **Did you communicate with candidates quickly, warmly, and with the information they needed?** Candidates will be assessing your organisation / church right from the start of their contact with you – and ultimately whether or not they want to work with you. Did you have someone specifically designated to respond to candidate queries? Did you have all the information related to the role in place? Were you able to answer their queries in a timely fashion?
- **Did you document the recruitment process accurately?** And did you meet General Data Protection Regulation requirements? You should ensure you have a Data Protection policy for recruitment and a document retention policy (covering both physical and electronic data) that is communicated to all candidates. This should include clarity on how long information is kept for (sufficient time to allow any complaints to be handled), and how and when the data will be securely destroyed.



A whole range of **free** resources for you to access: factsheets, downloads, links to e-learning, pro forma, blog posts and more.

General recruitment and selection resources

- [Recruitment – an introduction \(http://bit.ly/2KgZsFv\)](http://bit.ly/2KgZsFv): A factsheet from CIPD looking at the main stages of the recruitment process, from defining the role to making the appointment.
- [Recruitment \(http://bit.ly/2WzXvG5\)](http://bit.ly/2WzXvG5): Helpful online information from Acas for every stage of the recruitment process.
- [Selection methods \(http://bit.ly/2KhqkoU\)](http://bit.ly/2KhqkoU): An overview of candidate assessment methods, focusing on interviews, psychometric tests and assessment centres. Free factsheet from CIPD.
- [Acas e-learning \(http://bit.ly/2ldDh0D\)](http://bit.ly/2ldDh0D): Covering a range of employment relations topics and helping you understand best practice and current legislation.
- [The Acas Model Workplace \(http://bit.ly/2WzPu3H\)](http://bit.ly/2WzPu3H): Easy to use, the Acas Model Workplace helps you to check how good your organisation is at people management - from recruitment to performance management.
- [Job design \(http://bit.ly/2F6mieI\)](http://bit.ly/2F6mieI): The deciding of a job's key contents, from the duties and responsibilities involved to the systems and procedures followed by the person in that role. Helpful factsheet from CIPD.

Essential documents

- [Hiring staff \(http://bit.ly/2XERn0A\)](http://bit.ly/2XERn0A): Downloadable documents from Acas covering the whole of the recruitment process - from job descriptions to job induction templates, and everything in between!
- [Job description template \(http://bit.ly/2F7A3d7\)](http://bit.ly/2F7A3d7): A helpful tool from The Telegraph giving a detailed outline of what should be included.
- [NI Business Info \(http://bit.ly/2lFzt7C\)](http://bit.ly/2lFzt7C): A range of sample documents to browse.
- [Business Balls \(http://bit.ly/2X4C5Fi\)](http://bit.ly/2X4C5Fi): How to write job descriptions - with examples.
- [Job Descriptions \(http://bit.ly/2wPbzkt\)](http://bit.ly/2wPbzkt): Monster webpage offering a number of job description outlines.

Recruiting within the law

- [Recruitment - learn how to safely recruit within the law \(http://bit.ly/2Ratzz0\)](http://bit.ly/2Ratzz0): this CIPD webpage offers factsheets, Q&As, case law, guides, and reports.
- [What is indirect discrimination? \(http://bit.ly/2MNECj9\)](http://bit.ly/2MNECj9): Guidance from Ellis Whittam to help us be aware of the possibility of indirect discrimination.
- [Retention of HR records \(http://bit.ly/2lIT72F\)](http://bit.ly/2lIT72F): CIPD factsheet outlining legal issues in the UK around effective retention and organisation of HR records.
- [Data protection and GDPR in the workplace \(http://bit.ly/2XImUOZ\)](http://bit.ly/2XImUOZ): CIPD factsheet outlining the legal position on data protection in the UK, the obligations of employers, and individual rights surrounding access to information.
- [Do I have to advertise a job vacancy? \(http://bit.ly/31ZAIHs\)](http://bit.ly/31ZAIHs): Blog post from Mark Mason outlining issues to think through when you already have someone in mind who would be well suited to the role.



Issues specifically affecting Christian organisations and churches

- [The Equality Act – occupational requirement \(http://bit.ly/2WykK3i\)](http://bit.ly/2WykK3i): What are the circumstances where a church, mission agency or Christian charity can legitimately assert in a recruitment exercise that the post-holder must be a Christian?
- [Reflecting your Christian ethos in your HR documents \(http://bit.ly/2wTxJ4Z\)](http://bit.ly/2wTxJ4Z): Does your recruitment literature make clear what your organisation stands for and, if you're asserting that someone must be a Christian to undertake the role, is it clear from the job description that this is the case?
- [How should we go about recruitment and selection? \(http://bit.ly/31EEZ34\)](http://bit.ly/31EEZ34): A suggested recruitment procedure for an organisation with a Christian ethos.
- [Employment law – things you need to know \(http://bit.ly/2MsKs9E\)](http://bit.ly/2MsKs9E): Links to articles, webpages and blogs to keep abreast of employment law and HR issues that churches and Christian organisations need to be aware of in their particular context.

Interview, job offer and induction

- [A head for hiring: the behavioural science of recruitment and selection \(http://bit.ly/2WCEDpY\)](http://bit.ly/2WCEDpY): Factsheet from CIPD providing practical tips for avoiding bias in recruitment, attracting applicants, improving the candidate experience, and making better hiring decisions.
- ['The 13 fatal errors of interviewing' \(http://bit.ly/2WKdrdB\)](http://bit.ly/2WKdrdB): Is it 'halo and horns' or 'the similar-to-me' effect or something else affecting your decisions? A quick handy summary of the pitfalls to avoid when interviewing.
- [Pre-employment checks - guidance for organisations \(http://bit.ly/2Khuj4Q\)](http://bit.ly/2Khuj4Q): A downloadable guide from CIPD highlighting the key checks you need to carry out, while explaining the risks and practical considerations.
- [Contracts of employment \(http://bit.ly/2Khuj4Q\)](http://bit.ly/2Khuj4Q): Helpful basic information from Acas, including a downloadable Written Statement of Employment template.
- [The new employee's contract - a step-by-step guide \(http://bit.ly/2lyzUQQ\)](http://bit.ly/2lyzUQQ): A more detailed walk through the process from Acas, to ensure you cover everything you need to.
- [Induction factsheet \(http://bit.ly/31suYFW\)](http://bit.ly/31suYFW): A look at the induction process, and the purpose of induction for employer and employee, from CIPD.
- [What should be on your induction programme for new recruits? \(http://bit.ly/2WEuwAS\)](http://bit.ly/2WEuwAS): Acas webpage with links to a step-by-step process to settling a new employee, an induction guide, and an outline of a job induction checklist.