



*Promoting good practice*

*in the management and*

*support of aid personnel*

## Policy Guide and Template

### Recruitment and Selection

Created 2008

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## Foreword by People In Aid

*The ability to attract and select the best people for the work that needs to be done is critical to the overall success of all organisations and no more so than in the International Non Governmental Sector (INGO). Recruitment and selection is governed by legal compliance frameworks in most locations that aim to protect against discrimination and unfair treatment. But designing a high quality recruitment and selection process that meets the needs of the organisation involves more than simply legal compliance. It is about understanding the business needs and how the resourcing strategy can meet these. Then it is about being creative and innovative in order to present an attractive employment proposition to a broad yet relevant target market and develop assessment and selection techniques that will maximise opportunities for success in finding the best fit between new recruit, their job and their working environment in the short and longer term.*

*People In Aid*

## Introduction to the Policy Guides

Since its inception, People In Aid has been bringing together agencies working in the aid and development sector, to enhance the impact they make through better management and support of staff and volunteers.

This document is part of a People In Aid initiative, the 'Policy Guidelines', whereby agencies share their knowledge and experience of a particular issue in order to increase the quality of people management generally within the sector. It forms part of a bank of reference material on a range of people management themes. The material is categorised in three levels:

- Resource Sheets – one or two pages of references and sources of information
- Information Notes – slightly more detailed overview of a specific area of interest
- Policy Guidelines – more detailed documents offering guidelines on policy development

For those agencies which have no established policy we hope this document both prompts and assists you. For those agencies which already have a policy, perhaps the document will encourage a re-think in one or two areas, or a complete revision.

The following notes are not intended to give you an 'off the shelf' policy which you can immediately use within your own organisation. They do, however, offer you the thinking and experiences of other agencies in our sector and prompt you to assess how your own organisation, with its unique mission, values and resources, can best respond to your organisational and staff needs in this important policy area.

The People In Aid Code of Good Practice suggests that human resource policies benefit the organisation most when staff have been involved in their creation and are briefed on their use. In addition, effective policies require managers to implement them and monitor their effects.

We hope to be continually updating our policy guide documents. This relies on new knowledge and experience being relayed to us by you. Please e-mail us on [info@peopleinaid.org](mailto:info@peopleinaid.org) with your contributions and comments.

## **Acknowledgements**

This document has benefited from the policies, suggestions or thinking of Christian Aid, Health Unlimited, MAF, Oxfam Australia, Plan International and Save the Children UK. People In Aid would like to thank them for their input.

## **Purpose of this guide**

This guide offers guidelines to those responsible for developing a recruitment and selection policy. It aims to provide a brief introduction to the subject and suggestions based on recognised good practice and the experience of organisations within the INGO community. The guide examines the various elements that might be included in a recruitment and selection framework and some of the questions that an organisation may wish to address as they develop their approach.

We do not aim to replace specific legal advice and all HR practitioners and managers involved in recruitment and selection are strongly advised to make sure they are aware of the legal frameworks within which they are working that relate to discrimination and the need for fair and equal treatment of candidates, asylum and immigration rules, data protection, employing persons with criminal records and anyone who will be working with children or vulnerable adults.

Finally, we offer an example recruitment and selection policy which draws on the policies and experience of the organisations who have contributed to the development of this guide.

## **Link to People In Aid Code Principles and Indicators**

Recruitment and selection is a critical activity for all organisations to ensure that it has the right people, at the right time, in the right places, equipped and able to do what needs to be done to fulfil organisation objectives. Nowhere is this more important than in the INGO sector where an agency's product truly is its people, and their calibre and commitment have a direct impact on organisational performance.

For this reason the People In Aid Code has a principle dedicated solely to the process of recruitment and selection to help organisations succeed in attracting, recruiting and retaining the right talent.

### **People In Aid Principle Five: Recruitment and Selection**

“Our policies and practices aim to attract and select a diverse workforce with the skills and capabilities to fulfil our requirements.

Our recruitment and selection process tells candidates about our agency. How we recruit and select our staff significantly influences how effective they are in fulfilling our objectives.”

### **Indicators:**

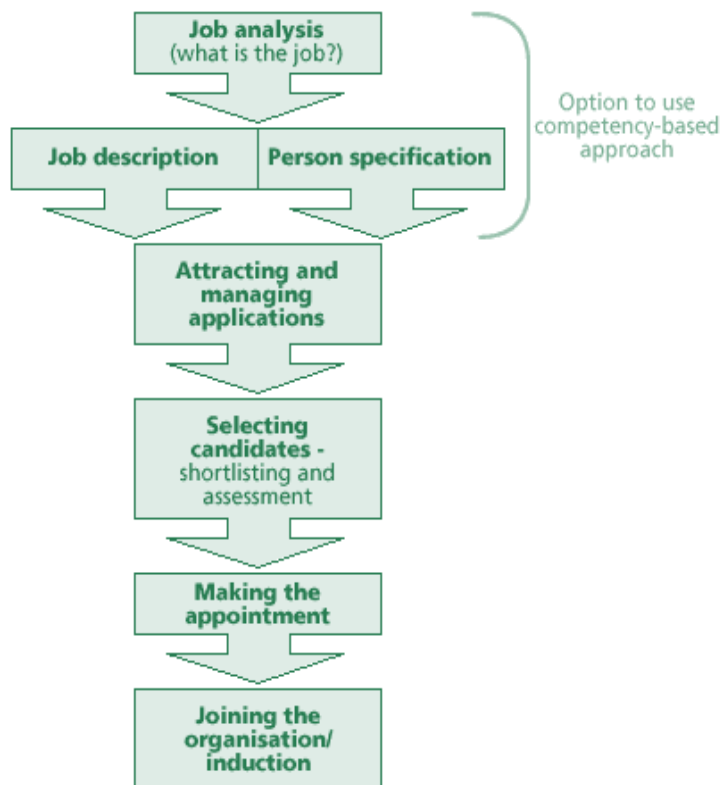
1. Written policies and procedures outline how staff are recruited and selected to positions in our organisation.

2. Recruitment methods aim to attract the widest pool of suitably qualified candidates.
3. Our selection process is fair, transparent and consistent to ensure the most appropriate person is appointed.
4. Appropriate documentation is maintained and responses are given to candidates regarding their selection/non-selection to posts. We will provide feedback if necessary.
5. The effectiveness and fairness of our recruitment and selection procedures are monitored.

**The stages of the recruitment and selection process**

This guide focuses on the process of recruiting and selecting and aims to provide a framework within which to develop your approach. Resourcing in its wider sense as part of an integrated HR strategy, including issues such as workforce planning, diagnosing resourcing problems, strategic resourcing and employer branding is covered in other publications including the People In Aid “Recruitment and retention handbook” which was produced to accompany a one day workshop of the same name and is available at [www.peopleinaid.org/resources/publications.aspx](http://www.peopleinaid.org/resources/publications.aspx)

The figure below provides a pictorial overview of the main stages of the recruitment and selection process.



From : CIPD Recruitment factsheet, 2007

## Recruitment

### Authority to recruit

Recruiting a new member of staff represents a major investment for an organisation. Nothing should happen in a recruitment process therefore, unless and until the appropriate authority to recruit is given. This usually involves the budget holder or suitably placed senior manager checking that a vacancy in the establishment does actually exist and that there are finances available to fill it, then authorising the recruitment to proceed. Most organisations use a staff requisition request or similar form to request and grant authorisation to recruit.

Levels of authorisation may vary depending on:

- the size and nature of the organisation
- the nature of the contract – long term or permanent contract or short term or emergency fixed term contract, or consultancy agreement
- seniority of the post
- location of the vacancy
- whether the vacancy is a new job or replacing a leaver

*Question to consider when developing your approach:*

- What governance and authorisation process do we wish to put in place to authorise recruitment? In some organisations the directors may be required to sign-off on recruitment spending, however, in larger or more geographically dispersed organisations this could slow down the process so a lower level of a sign-off may be more appropriate for some or all recruitments.

### Role/job analysis

Role/job analysis is the process of figuring out what needs to be done and what skills, experience and competencies are required to do it. It is more than simply drawing up a list of tasks or responsibilities, it is a critical stage in the recruitment processes where the purpose of the role and how it will contribute to the bigger picture in the organisation is determined and validated. Just because “we’ve always had someone doing this...” does not necessarily mean that we always will need to have someone doing it.

*Questions to consider when developing your approach:*

- What needs to be done?
- What is the purpose of this role – their critical outputs and contribution that it will make?
- If this is an existing job do we need it to look exactly like it did before or does the vacancy represent an opportunity to re-model the role? What are the implications of this?
- What are the essential and desirable skills, experience and competencies required for success in this role?

### Role profiling/job description writing

The process of role/job analysis feeds directly into job description writing. Having identified the purpose of the job, how it fits within the organisation structure, what sort of outputs will be required and the skills etc needed to deliver them, the process of job description writing collates and presents these in a format that is useful both for

the recruiter, as a set of objective criteria against which candidates can be selected, and potential candidates, as the key source of information about the job and what it entails. It is therefore important that the job description is as accurate, informative and as realistic as possible so that it is not misleading for candidates, and allows recruiters to focus on the important elements of the job and candidates to ensure best possible “fit”.

Role profile/Job description formats vary, however they usually include the following information:

- Job purpose
- Job title
- Job location
- Reporting lines
- Key accountabilities – not just a list of tasks but the 8-10 core areas against which output will be judged and for which the post holder will be held accountable. Well written accountabilities articulate not only what the job holder will be accountable for but why this is important e.g. an accountability statement could read: “Prepare, monitor and control the annual departmental budget in order to ensure expenditure is in line with the Business Plan.”
- Person specification – the skills and experience necessary to do the job. This may be split into elements which are essential to be able to do the job and without which an appointment cannot be made and desirable criteria which are “nice to have” and which might set one candidate apart from others
- Behavioural competencies (where a competencies framework exists) – the behaviours that will be critical to success for this job
- Important contextual or job specific information which will help potential candidates decide if this might be the job for them such as, flexible work options including flexible location, travel requirements etc

There is no right or wrong length for a job description, but a couple of pages is probably optimal. Additional background information about the programme, department or other contextual information such as an organogram can be appended or included in the recruitment pack if considered useful.

*Question to consider when developing your approach:*

- How will we structure and lay out our job description template so that it is user-friendly for both candidates and recruiters?
- What is the key basic information that will be needed to inform short listing decisions **and** help candidates make informed choices about whether they want to apply for the post?
- What sort of language/tone of voice do we want our job descriptions to be written in and how will we ensure consistency e.g. jargon and acronym free, accessible to external and internal candidates?

## Using competencies

Competencies describe the critical behaviours that an organisation has identified as important for its workers to be successful in delivering their objectives and fostering a productive, professional and effective working environment. As well as promoting effective ways of working they are usually linked to organisational values and can be seen as one way in which those working for the organisation live those values in practice.

Competencies are particularly useful in helping to identify good fit between individuals' skills and experience, the organisation's culture and preferred ways of working, and the needs of the job. How often have you come across someone who is brilliantly qualified for a role in terms of their skills and experience but is like "a square peg in a round hole" when it comes to the way they work alongside their colleagues? Competencies allow the critical behavioural elements of what is required for success to be articulated and tested during the recruitment process thus minimising the potential for recruitment failure due to "fit".

For more information on competencies and their uses see the People In Aid Information Note "Developing Managerial Competencies"

[www.peopleinaid.org/pool/files/publications/developing-behavioural-competencies-inotes.pdf](http://www.peopleinaid.org/pool/files/publications/developing-behavioural-competencies-inotes.pdf)

*Question to consider when developing your approach:*

- Do we have a competencies framework and if not, should we get one?
- How confident are our recruiting managers in using this for recruitment purposes, both in terms of articulating what sort of behaviours are needed for success and then in structuring interview questions to test for these and what help can be offered to increase confidence and capability?
- Are there some core behaviours that apply to all staff in our organisation regardless of where they are located and what they do?
- Are there some specific functional behaviours that might apply to particular specialisms or locations/environments e.g. how might the critical competencies for a humanitarian aid worker vary from those of an HQ support person if at all?
- Can all our staff relate to your competencies regardless of their nationality, ethnicity, culture or other factors affecting their world view?

## **Attraction**

Once you have clarity on the purpose of the job, and have articulated what skills and competencies are required the next step is to attract potential candidates who are suitably qualified and experienced.

### **Internal recruitment:**

Most organisations advertise all their vacancies internally as a matter of course either via a regular vacancy bulletin or on an on-going basis via their intranet site or other web based communication tool.

Some organisations choose to restrict recruitment to internal candidates as part of their talent management approach where:

- they are confident that there is a good internal pool of suitable candidates
- they want to offer the vacancy as a development opportunity with appropriate support as part of a wider talent management strategy and it is felt that a suitable pool of internal candidates exists
- there is a requirement to attempt to redeploy existing staff as a result of internal restructuring.

### **External recruitment:**

Some organisations automatically advertise all vacancies both internally and externally either to save time or to try and attract the widest possible potential

candidate base. For example, there has been a trend in recent years to encourage cross sector movement, particularly within some management roles, so that professionalisation programmes can benefit from learning from other sectors.

What is important is that, once your target recruitment pool is identified (i.e. internal or external) your equal opportunities policy is applied to all applicants who qualify to apply.

*Questions to consider when developing your approach:*

- Are there particular jobs that we would wish to restrict to internal recruitment only?
- Are there particular jobs where we would always wish to test the external market?
- Do we have a process for helping managers make these decisions?
- What other factors might influence the decision?
- Do some locations require local appointment only, due to work permit or other reasonable restrictions (e.g. security)?

## **Advertising**

Choosing the right media to reach out to potential applicants is critical if your are to attract good quality candidates. Similarly, by experimenting with where and how you advertise you might be able to attract a wider range of candidates from different backgrounds.

Many employers have started to pay closer attention to their employer brand and, by borrowing techniques from marketing colleagues, more actively “sell” the benefits of working for their organisation to a wider potential audience. This involves having a clear and realistic idea of your employment proposition i.e. why would someone want to come and work for you and what experience and “rewards” in the widest sense can they reasonably expect. Similarly many organisations that can afford to do so now work with dedicated recruitment advertising agencies to help them get their adverts really working for them.

There are a wide range of places to advertise including:

- Specialist INGO publications and websites. These are particularly useful for field, programme, advocacy and campaigning posts where specialist sectoral knowledge and networks are required. Links to some of these sites can be found via our resources sheets at [www.peopleinaid.org/pool/files/publications/international-recruitment-resource-sheet-final.pdf](http://www.peopleinaid.org/pool/files/publications/international-recruitment-resource-sheet-final.pdf)
- Trade press for specialist and functional roles.
- General on-line recruitment sites for wider coverage e.g. monster and total jobs
- Via your own dedicated vacancies pages on your website.
- National newspapers in the relevant location and international subscription magazines such as the Economist - particularly useful for senior management appointments
- Via recruitment agencies. Increasingly INGOs are working with agents to help resource senior roles and some specialist positions both nationally and internationally.

### ***Tips for getting the most from your website:***

- Do not hide your vacancy page several layers down into your website site where it is hard to find.
- Give it a prominent, easy to find and eye catching position.
- Keep it up to date as old and out of date vacancies will drive potential candidates away.
- Brand your vacancies page so that it is attractive and welcoming and perhaps consider using case studies of the experiences of existing staff to help “sell” some of the opportunities that you have and the benefits of working for you e.g. opportunity to make a difference, personal challenge, professional development etc.
- Include well thought out adverts that are exciting and attractive. Do not just cut and paste elements of the job description and expect that to sell the role for you.
- Make applying as easy and painless as possible, and be alert to connectivity challenges that some candidates may have around the world. If your application form is too long or cumbersome to download it will put applicants off however much they may want to work for you.
- If at all possible find a way of acknowledging and thanking every application – or at the very least all those that have been submitted online with an automatic reply. Little things can make a huge difference to your employer brand and how welcome and well treated potential candidates feel.
- Some agencies have invested in recruitment and selection software which can help manage relationships with candidates and potential candidates, including humanitarian response rosters. They are not cheap, but the investment could be worth it, particularly if you have high recruitment volumes for emergency scale-up for example.

## **Applications**

In Europe, Australia and North America the most common way to submit applications is now electronically via email or a dedicated on-line recruitment tool located within an organisation’s website. This is increasingly also the case in other parts of the world, for some jobs but by no means all. It is possible that you may wish to restrict applications to electronic media in some locations as this is easier and can, potentially, result in shorter recruitment times. However, in other locations where email is less available or reliable, hard copy applications will also need to be accepted, with consequent longer lead times for candidates to receive information and turn round their application.

There are two main methods for candidates to register their interest in a job, each with their own pros and cons:

**CVs:**

- These are perceived as the easier way to apply by many candidates and are therefore often used when a wide ranging response is wanted, or organisations would like to attract applicants who may not have considered them previously. However, a good CV which is targeted to the specific job can take as long to create as filling in an application form.
- They allow the candidate to “sell” their experience in their own way without any restrictions.
- They allow candidates the freedom to include whatever information they think is relevant and appropriate which can require real recruiter skill to short list consistently.
- Because it is possible to have a standard CV some candidates apply for a range of diverse and sometimes inappropriate jobs. Shortlisters, however, have to sift out their applications.

**Application forms:**

Application forms are more directed and force the candidate to focus on specific information that the recruiting organisations has deemed necessary e.g. biographical, skills and experience and often personal suitability for the post, but addressing the person specification and competencies required. This makes consistent short listing easier. The biggest draw back of using application forms exclusively is that many candidates are put off by them as they perceive them to be inflexible in terms of the information they would like to share, cumbersome to use (sometimes being difficult to download and upload) and unnecessarily bureaucratic and time consuming.

The CIPD recommends that in order to be useable and useful, application form design should:

- be realistic and appropriate to the level of the job
- use clear language
- be piloted for readability and ease of completion
- not request detailed personal information unless relevant to the job
- state the procedure for taking up references, how these will be used and at what stage in the recruitment process they will be taken
- be accompanied by details of the job and clear information about the application and selection procedure
- enable you to draw up a short list of candidates
- provide a source of information to draw on in the interview
- help track how applicants found out about the position – to enable a review of the effectiveness of recruitment methods used
- provide a store of information about good but unsuccessful candidates that can be filed (either in hard copy or electronically) for future use.

*Questions to consider when developing your approach:*

- Do we want to insist on a preferred method of applications for all candidates?
- Is it appropriate to apply the same process to all vacancies e.g. short term fast recruitment for humanitarian responses and permanent appointments to the board?
- What perceptions of us as an organisation does our application process create – easy to work with and user friendly or bureaucratic and cumbersome?

- What information will we provide to candidates to help them make the best application they can e.g. background information, competencies framework, organogram etc?
- How can we efficiently and cost effectively keep applicants informed of how the process is going and the status of their application - i.e. begin to develop a relationship with them at this point in the process?

## Selection

### Principles

It may be helpful to identify a set of guiding principles which will apply to all your recruitment processes regardless of the location, nature and seniority of the role, and type of contract being offered.

For example Christian Aid have identified the following principles against which their selection processes can be measured even though the actual selection methods may vary:

“The selection of staff will take into account Christian Aid’s need for new ideas and approaches and to support Christian Aid’s commitment to ensuring a diverse workforce.

The selection process should be:

- Transparent
- Timely
- Cost effective
- Equitable
- Free from conflict of interest”

Other principles that you might wish to consider include:

- Culturally appropriate
- Recognises diversity in the candidate base

*Question to consider when developing your approach:*

- What principles do we want to guide our approach to recruitment and selection that will help us to live our values and succeed in attracting high caliber candidates?

### Short listing

Short listing is the process of selecting the most appropriate candidates from all the applicants to go forward to the next stage of the assessment process. Transparent and objective short listing is one element against which an organisation will be judged for legal compliance in terms of anti-discrimination legislation. Whatever approach you decide to take to short listing it is important that it is consistent, fair, and decisions are recorded.

Typically a list of criteria is created based on the person specification in the job description against which all the applications can be measured. Often a simple scoring mechanism is used in which some elements can be weighted. Having more than one short lister can help avoid bias or discrimination creeping into the process.

Increasingly technology is playing a part in the initial selection process, in particular the use of on-line recruitment systems to help with the first sift where large numbers of applications are received. Utilising online technology also offers the opportunity to introduce selection questionnaires that ask questions that are critical for appointment, such as ability to travel, work permit restrictions etc. Similarly, some organisations now use self-selection questionnaires which use a series of focused questions to help candidates determine their own suitability for the role.

*Questions to consider when developing your approach:*

- What are the essential criteria that can be identified from the application, without which an appointment could not be made?
- What are the desirable criteria which would be nice to have?
- How shall we approach short listing?
  - Initial long list provided by HR then shortlist for assessment selected by the recruiting manager?
  - All applications to be seen by the recruiting manager?
  - Single person sift or short listing completed by a panel?
  - If a panel is used should they short list together or separately and then compare and discuss their results to reach a final short list of candidates for interview?
- What paperwork will we require our shortlisters to complete and what level of detail of decisions do we need?
- What additional questions or pre-selections tests would be useful to introduce as part of the short listing process?

## **Assessment methods**

There are a range of assessment methods available to help select the best candidate for the job. They vary in ease of use and their reliability in predicting success in a job. Many organisations use a combination of two or more methods in order to assess a range of critical factors. The key to designing a good selection process is choosing the right combination of assessment methods for the role in question, being clear what you want to test for and tailoring so that they will help you to do this. Assessment methods include:

- Interviews
- Presentations
- Psychometric tests – ability and aptitude tests
- Role play exercises
- In-tray exercises
- Work sampling
- Staff panels – opportunity for a general discussion with members of staff

We have chosen to focus on the most common and, possibly, the most controversial below.

### ***Interviews***

The most common method of selection is the traditional selection interview which allows past performance to be discussed and explored in a face to face meeting. Interviews allow the candidate the opportunity to meet their manager and potential colleagues and find out more about the job and working environment to help them make their mind up about the suitability of the role for them. They allow the employer the chance to assess the candidate's suitability for the role, explain the job in more

detail than in the job description and answer questions about the organisation, the contract etc.

Research suggests, however, that interviews alone are not a fail safe means of selecting the best candidate for the job. Anderson and Shackleton's summary below outlines a range of reasons why interviews should be approached with appropriate levels of caution.

- **The self-fulfilling prophecy effect.** Interviewers may ask questions designed to confirm initial impressions of candidates gained either before the interview or in its early stages.
- **The stereotyping effect.** Interviewers sometimes assume that particular characteristics are typical of members of a particular group. In the case of sex, race, disability, marital status or ex-offenders, decisions made on this basis are often illegal. However, the effect occurs in the case of all kinds of social groups.
- **The halo and horns effect.** Interviewers sometimes rate candidates as 'good' or 'bad' across the board and thus reach very unbalanced decisions.
- **The contrast effect.** Interviewers can allow the experience of interviewing one candidate to affect the way they interview others who are seen later in the selection process.
- **The similar-to-me effect.** Interviewers sometimes give preference to candidates they perceive as having a similar background, career history, personality or attitudes to themselves.
- **The personal liking effect.** Interviewers may make decisions on the basis of whether they personally like or dislike the candidate.

ANDERSON, N and SHACKLETON, V. (1993)  
*Successful selection interviewing.* Oxford: Blackwell.

Interviewers must therefore approach their task with their eyes open and be aware of these tendencies in themselves and their co-interviewers. This can be a good reason for not interviewing alone.

Interviews can be carried out in a one to one situation, or with two or more interviewers in a panel style. They can be carried out face to face or over the telephone. Typically in the INGO sector panel interviews are the norm as this makes it easier for the panel members who are not speaking to observe and take notes, thus ensuring that nothing gets missed. They also offer the opportunity for technical specialist knowledge to be represented in the discussion as well as the line management perspective.

Telephone interviews are particularly useful in international recruitments for first level screening. However, it is always recommended, as far as practicable and affordable, that second interviews should be face to face. Where this is not practical the interviewers must take care to ensure that the interview is thorough and fair to the candidate(s) and all the due diligence checks are thoroughly done prior to an offer being made. Video interviewing is also sometimes used as an alternative to telephone.

For more information and tips on structuring an interview and types of questions please see the People In Aid Information Note which accompanies this policy guide: [www.peopleinaid.org/resources/publications.aspx](http://www.peopleinaid.org/resources/publications.aspx)

## ***Psychological testing***

“Psychological tests are tests which can be systematically scored and administered, which are used to measure individual differences (for example in personality, aptitude, ability, attainment or intelligence). They are supported by a body of evidence and statistical data which demonstrates their validity and are used in an occupational setting.”

CIPD Factsheet on psychological tests, April 2007

These types of tests have become more common in the INGO sector over the last ten years particularly for managerial and some specialist roles where ability, aptitude and personality make-up are critical to the overall success of the individual in the role. They can be very useful in providing insights which can then be explored further during a traditional interview, however, care must be taken to ensure that:

- the correct tests are applied to the job in question (i.e. they test appropriate abilities, aptitudes or personality traits and are designed for selection rather than development purposes)
- they are administered consistently
- are not used in isolation but as part of an integrated approach to the selection of candidates
- adequate candidate feedback and test monitoring is put in place

More information on psychological testing can be obtained from the CIPD ([www.cipd.co.uk](http://www.cipd.co.uk)), the British Psychological Society testing centre ([www.psychtesting.org.uk/](http://www.psychtesting.org.uk/)) and the International Test Commission ([www.intestcom.org/](http://www.intestcom.org/))

*Questions to consider when developing your approach:*

- What experience, skills, aptitudes and personality traits do we want to assess? This question should be asked and answered for each selection process
- What assessment methods will help us to most fairly and objectively make this assessment?
- What sort of interviews should we include in the process – face to face, telephone, video, one to one or panel interview?
- Should we have a one stage interview process or would it be more appropriate to have a two or even three stage approach for some posts?
- How will selection decisions be arrived at and who has the final say if there is disagreement in the panel? Normally this would be the recruiting manager so it is important that everyone is clear who this is.
- What sort of feedback shall we offer to candidates? Who will provide it and how?
- What sort of training, updates and on-going support do we need to offer to our recruiters and should this be mandatory?

## **Offer and due diligence checks: references, medical, child protection**

Having made your selection the next step is to carry out the appropriate due diligence checks prior to offer or, at least, prior to commencing employment. These may vary slightly from job to job but typically involve:

- Employment references
- Pre-employment medical checks
- Child protection clearance – where appropriate
- Work permit/visa checks and applications

- Proof of qualifications and accreditations necessary for the job (e.g. chartered accountant, driving license, engineering qualification)

For more information on references please see the People In Aid Information Note “References” at: [www.peopleinaid.org/pool/files/publications/references-inote.pdf](http://www.peopleinaid.org/pool/files/publications/references-inote.pdf) or Employment Reference Guidelines for the Sector [www.peopleinaid.org/pool/files/publications/employment-reference-guidelines-for-the-sector\(1\).pdf](http://www.peopleinaid.org/pool/files/publications/employment-reference-guidelines-for-the-sector(1).pdf)

*Questions to consider when developing your approach:*

- What due diligence checks should we be carrying out on **all** appointments?
- Which checks are appropriate for some posts only – which checks and which posts?
- Should we take up references prior to offer (with the candidate’s permission) or should we offer employment subject to satisfactory references?
- Whose responsibility is it to take up references?
- Should all references be written or should we allow telephone references for ease and speed.

### **Overseas applications to the UK (work permit issues), International posts**

Some posts attract applications from outside the recruiting country. Travel costs to interview can be expensive and it may be appropriate to conduct preliminary interviews by phone or at a location closer to the candidate(s). If it is determined that a candidate should proceed to the next stage of the selection process then travel to the HQ, regional centre or wherever the main assessment event is being held can be authorised.

If you are encouraging applications from geographically dispersed candidates it is important to consider how you will continue to maintain a fair, transparent and consistent process that complies with legislation and your equal opportunities framework.

Employment in the UK and many other locations is dependant upon having appropriate permission to work in the form of nationality or a work permit/visa. It is possible to apply as an employer for a work permit on behalf of potential employees for some, but by no means all jobs. Work permit implications should therefore be investigated prior to launching the recruitment and any restrictions indicated to candidates to avoid wasted time all round.

International expatriate posts are highly expensive to resource and support and care should be taken when designating a post as an international recruitment that the skills and experience required and the consequent level and performance and impact that can be expected from an international caliber recruit truly warrant the designation and investment. Too often international staff find themselves sitting alongside national counterparts doing the same or very similar jobs but on quite different packages. It can cause resentment if the added value of an international appointment is not clearly apparent.

*Questions to consider when developing your approach:*

- Which posts would we want to open up to international recruitment and why?

- Are there any posts that we know we would not be able to get work permits for?
- What policy should we adopt with regard to international travel to selection events?

## Expenses

Most organisations have an expenses policy with regard to attendance at selection events. Typically these would involve mileage or standard class travel within country and economy flights with accommodation (one or two nights) for the candidate if travelling internationally.

## Induction

Induction is often the forgotten final stage in the recruitment and selection process. Ensuring that new recruits have a good on-boarding experience that equips them for the job they will be doing and orientates them about the organisation they have joined without overwhelming them with unnecessary detail will help maximise the potential for a successful and productive employment experience.

For more information on designing effective induction processes see the People In Aid Policy guide on “Induction, Handover and Briefing” [www.peopleinaid.org/pool/files/publications/induction,-briefing,-handovers-guidelines\(1\).doc](http://www.peopleinaid.org/pool/files/publications/induction,-briefing,-handovers-guidelines(1).doc)

*Questions to consider when developing your approach:*

- Who is responsible for induction? This may be more than one person for different elements of the process?
- What mandatory induction activities should all new recruits experience?
- What induction activities are discretionary and tailored specifically to the job?
- How will we monitor our induction process and continue to make sure we welcome new recruits in the organisation appropriately?

## Situations outside the normal R&S framework

Sometimes a full recruitment and selection process is not the appropriate solution to short term, temporary or ad hoc requirements. Other approaches that may be worth considering as part of your wider talent management and resourcing strategy include:

- Acting up
- Secondment
- Short term/temporary reassignment of duties e.g. during an emergency response

These approaches allow vacancies to be used as development opportunities for existing staff or to help the organisation temporarily deploy the most appropriate skills and experience at short notice to ensure efficient response to unplanned situations.

It is important, however, that these arrangements are carefully thought through during their set-up and are not just used as a means to defer recruitment or gap-fill with inappropriately qualified or experienced staff.

## Short term emergency appointments

Many agencies use pre-screening and selection to enable them to be able to respond swiftly in an emergency response situation where scaling up staff numbers needs to be done quickly but without compromising the integrity of the assessment and selection process. Rosters are widely used to help with this process. For more information on creating and managing rosters please see to the People In Aid information note on managing emergency rosters

[www.peopleinaid.org/pool/files/publications/emergency-response-rosters-inotes-final.pdf](http://www.peopleinaid.org/pool/files/publications/emergency-response-rosters-inotes-final.pdf)

In addition, some organisations waive some elements of their standard recruitment process during an emergency response recruitment process such as introducing shorter deadlines, or allowing candidates who have previously worked with the organisations to be “headhunted” for contracts of up to 6 months.

These exceptional processes have great advantages in enabling a humanitarian response to proceed swiftly, however, they are open to abuse and can be seen by some as a way of getting staff in quickly for longer contracts. If a manager wishes to extend a contract beyond the six month threshold the method of recruitment can create internal difficulties for both the employee and the programme. Truncated recruitment processes should, therefore, only be used when the situation genuinely warrants it.

## Monitoring and record keeping

Each stage of the recruitment and selection process should be capable of audit and a suitable paper trail which is relevant and accurate yet not overly bureaucratic should be maintained at each stage of the process. It is important that a clear record of all decision making is retained in case any decisions are challenged and for feedback purposes. It is also helpful to maintain records and monitor candidate profile via a confidential equal opportunities questionnaire. In some places this is a legal requirement.

*Questions to consider when developing your approach:*

- What paperwork should we ask our recruiters to complete and in what level of detail – short listing grids, interview record sheets, records of conversations and feedback given to unsuccessful candidates, telephone interview notes?
- How long will we keep recruitment records for?
- What equal opportunities monitoring will we undertake and what will we do with the results?
- What other monitoring and evaluation would it be useful to undertake such as successful versus unsuccessful processes, assessment approaches that were particularly successful in eliciting good quality information?

## Policy implementation

The way in which you implement and publicise your policy will depend on the culture and communication norms of your organisation. We have therefore not attempted to offer a “one size fits all” good practice implementation guide, suffice to say that clear communication, adequate training and regular legal updates for those involved in recruitment and selection is key to ensuring both legal compliance and developing both skill and consistency in recruiting great talent for your organisation.

## Further reading and resources

The following represents a selection of the vast array of material available on the subject of recruitment and selection. However, People In Aid do not recommend specific books or authors.

CIPD fact sheets are available on a range of aspects of the recruitment and selection process. [www.cipd.co.uk](http://www.cipd.co.uk)

The British Psychological Society testing centre ([www.psychtesting.org.uk/](http://www.psychtesting.org.uk/))

The International Test Commission ([www.intestcom.org/](http://www.intestcom.org/))

Question styles and formats for job interviewing, Murphy, N. Employment Review, No.875 18 June 2007 6pp. (useful for telephone and behavioural interview techniques)

Recruitment and Selection, Roberts, G. 2<sup>nd</sup> ed. June 2005, CIPD ISBN: 1843981173 and ISBN13: 9781843981176

The complete recruitment and selection toolkit, Taylor, D., Fox, G. November 2000, CIPD, ISBN: 0852928696 and ISBN13: 9780852928691

## Appendix 1 - Sample Recruitment and Selection Policy

### RELIEF AID\* – Recruitment and Selection Policy

**Date of Policy Issue:**

**Issue Number:**

**Date of Policy Review:**

#### 1. Introduction

Relief Aid recognises that attracting and selecting the best qualified candidates for our vacancies is critical in delivering our organisational objectives. It is our aim that our recruitment and selection processes ensure that we attract the best quality candidates and that assessment and decision making is carried out within a framework that is fair, transparent and consistent.

#### 2. Scope

This Policy sets out the principles of good practice in Recruitment and Selection, and in promoting equality of opportunity for all candidates to be applied throughout Relief Aid worldwide, whatever the vacancy and whoever the recruiting manager. We acknowledge that different circumstances, cultural contexts and legal requirements will prevail in the different countries in which we work. This policy is therefore intended to provide a framework to guide design of high quality recruitment and selection processes and support robust judgments to be made. It is the responsibility of all managers to ensure that these principles are appropriately applied.

#### 3. Roles and responsibilities

**Line Managers (recruiting managers):** must ensure that they comply with this policy, Relief Aid's equal opportunities and diversity policies and the prevailing legislation regarding recruitment and selection and employment of staff in the location in which they are operating. They must also ensure that they have attended the mandatory training and bi-annual review briefings prior to undertaking a recruitment process.

**HR:** will support recruiting managers in the design of good quality recruitment and selection processes and in administering elements of that process such as placing advertisements, arranging assessment events including administering psychometric tests if necessary, sitting on interview panels if required and issuing contracts of employment.

**Panel members:** should make themselves available to participate in the elements of the process which they have agreed to take part in such as short listing, interviewing, staff panel etc. They should be clear on the role that they are being asked to play in the process, prepare accordingly and undertake any recruitment and selection training that may be required of them.

#### 4. Recruitment and selection principles

Recruitment and selection processes at Relief Aid will be:

- Transparent

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\* Fictitious agency

- Timely
- Cost effective
- Equitable
- Free from conflict of interest
- Accessible to all regardless of their background

### **5. Planning the recruitment and selection process**

It is the responsibility of the recruiting manager to design the process in compliance with Relief Aid's recruitment and selection principles and local labour law to ensure that they maximise the chances of recruiting the best person for the job first time round. This planning can be undertaken in collaboration with your HR business partner who will offer support, guidance and learning from previous processes.

Planning should involve:

- Obtaining authority to recruit
- Identifying who will be involved, securing their commitment and booking their time as early as possible
- Job analysis and job description writing
- Confirmation of grade, salary range and terms and conditions – collaboration with HR
- Scheduling the stages of the recruitment process and ensuring that all those involved are aware of their part and when they will be required
- Identifying suitable assessment techniques - in collaboration with HR
- Leading the assessment and selection process
- Ensuring the relevant documentation is completed and submitted to HR for archiving
- Ensuring the relevant due diligence checks are completed
- Agreeing the offer with HR prior to making it
- Planning the welcome and induction of the new recruit

### **6. Authority to recruit**

Authority to recruit should be requested by completing a staff requisition form outlining the reason for the vacancy, a brief statement of the job's purpose, the designation (i.e. local hire or international hire), contract length and terms and suggested conditions including salary range. New vacancies must be authorised by the relevant division director. Replacement vacancies for existing jobs can be authorised by the department head. No recruitment can take place without the relevant authorisation being obtained first. If the post is to be designated as an international hire a business case outlining the reasons must accompany the staff requisition in all instances, even where the recruitment is a replacement for an existing international post. The decision will be made by the relevant manager in conjunction with their HR business partner.

### **7. Job Analysis**

This is the process of determining what needs to be done and articulating the purpose of the job in terms of its outputs and where it sits within the organisation's structure and how it contributes to achieving team, department, division and organisation goals. This should be undertaken for all new jobs and a review of the the job requirements should also be undertaken when recruiting a replacement for an existing role to check whether it needs to change.

### **8. Job description**

The job description can now be drafted using the information from the job analysis process. The standard Relief Aid job description template should be used and you should aim for it to be no more than two pages long. You must identify the 8-10 key

accountabilities of the role, the essential and desirable skills and experience and the critical behaviours with reference to the Relief Aid competencies framework.

For new jobs the grade should be agreed in collaboration with your HR support person in line with the Relief Aid job evaluation policy – see separate policy.

### **9. Advertising**

All vacancies must be advertised internally in compliance with Relief Aid's equal opportunities policy. A decision will be made by the recruiting manager in consultation with their HR business partner whether to advertise externally at the same time.

In some instances, such as restructuring where staff are at risk of redundancy, it may be appropriate to restrict recruitment to internal candidates in the first instance. Equally, where there is a strong internal field of candidates or where the creation of internal development opportunities is desirable recruitment may be restricted.

In all other instances vacancies will be advertised externally using one or more of the following methods:

- Relief Aid website vacancy pages
- External websites which are appropriate to the vacancy e.g. INGO specific sites, general website, charity sector websites.
- Trade press
- National press
- Job centres
- Via professional networks

For external media such as national and trade press and for senior appointments our recruitment advertising agency should be consulted to help secure the best rates and to ensure copy style and type setting complies with the Relief Aid brand and house style. Details of our agency can be obtained from the HR department.

### **10. Applications**

Applications should be submitted online where possible, but may be submitted in hard copy where this is not possible and closing dates should be set with this in mind. All applications should be acknowledged as far as is practicable. Candidates should submit their application in the form of a CV with accompanying document that outlines how their experience, skills and competencies meet the requirements of the job.

Copies of job descriptions, competencies framework, organograms, terms and conditions and any other useful information should be made available to candidates on request or may be placed on the website and linked to the vacancy notice.

### **11. Shortlisting**

Shortlisting criteria, drawn from the person specification will be used to select those candidates who will be invited to take part in the assessment stage of the recruitment. Criteria should be categorised as essential and desirable and each application should be assessed against these using the Relief Aid short listing grid.

Where a large candidate field is anticipated and by prior agreement, the HR team will provide an initial sifting service and will provide recruiting managers with a long list of candidates from which they can then choose a short list to be invited for interview.

In some cases it may be appropriate to work with an external recruitment agency. This should be arranged in collaboration with your HR business partner.

## **12. Assessment**

All short listed candidates will be offered an interview (face to face or over the phone) as a minimum selection method. All interviews will be by panel with a minimum of two interviewers. Should telephone interviews be used, at least one member of the telephone interview panel must have attended the Relief Aid telephone interviewing training event. Telephone interviews should only be used as a first interview in a staged process unless unavoidable.

In most cases a combination of assessment methods will be used to inform the decision of the selection panel. Assessment methods available include:

- Presentations
- Psychometric tests – ability and aptitude tests
- Role play exercises
- In-tray exercises
- Work sampling
- Staff panels – opportunity for a general discussion with members of staff

The most appropriate combination of assessments methods for the post will be determined by the recruiting manager and their HR Business partner.

## **13. Making an offer**

Once the decision has been made which candidate to select, the terms and conditions to be offered should be agreed between the recruiting manager and their HR Business partner who will be able to offer input on the question of internal parity and market value. Only then can a formal verbal offer be made subject to satisfactory references, medical, work permit and any other pre-condition of employment that may be required.

It is the line manager's responsibility in collaboration with the HR department to ensure that no recruit commences work before their due diligence checks have been made and satisfactory responses received.

The recruiting manager should make themselves available to provide verbal feedback to any candidate who has attended for interview who wishes to discuss their performance. Written feedback is not normally provided.

Once the offer has been accepted a contract of employment will be issued by the HR department.

## **14. Induction**

Making new recruits feel at home and equipping them for success in their new jobs is a critical part of the recruitment and selection process. There are two elements of induction:

- Induction to the job – this is the responsibility of the manager. This is a bespoke process, tailored to the needs of the job and the individual recruit.
- Induction to the organisation – this is the responsibility of the manager also in collaboration with the HR team and will usually involve attendance at the Relief Aid welcome event.

More information and advice on designing and delivering a good induction experience can be found in the Relief Aid induction guide and from your HR business partner.

### **15. Short term temporary emergency response appointments**

In the case of emergency response scale up or other where existing rosters and recruitment mechanisms are unable to meet demand for suitably qualified staff permission may be granted to “headhunt” candidates for contracts up to 6 months in duration. Headhunting means approaching a candidate directly who is known to Relief Aid, usually because they have worked for us before, with a provisional employment offer. However, they must still have a satisfactory interview discussion and satisfy the normal due diligence checks before the offer can be confirmed. Permission to headhunt can be obtained from the divisional director on provision of a business cases outlining the requirement and justification for this course of action.

### **16. Monitoring**

Recruiting managers have a responsibility to ensure that all relevant paperwork is complete and submitted to the HR department at the end of the recruitment and selection process for archiving. This includes:

- Signed staff requisition
- Applications
- Completed shortlisting grid
- Interview notes and other assessment records
- Copies of references and other due diligence checks that fall within the manager’s brief

It is the responsibility of the HR function to monitor equal opportunities returns and present reports including analysis and recommendations for action to the board on a quarterly basis.

### **17. Support and training**

Each recruitment panel must contain at least one member who has completed the Relief Aid recruitment and selection training event. All recruiting managers must attend this event and the bi-annual refresher training to ensure that you are up to date with the latest legal developments and assessment techniques.

For more information and specific advice and guidance on this policy and on issues related to recruitment and selection, including designing a recruitment and selection process contact your HR business partner.

Ends...

Visit the online People In Aid member resource site for examples of current INGO recruitment and selection policies. **The People In Aid Policy Bank:**  
[www.peopleinaid.org/resources/policybank.aspx](http://www.peopleinaid.org/resources/policybank.aspx)

Other related **Resource Sheets and Information Notes** can be found on  
[www.peopleinaid.org/pool/files/publications/international-recruitment-resource-sheet-final.pdf](http://www.peopleinaid.org/pool/files/publications/international-recruitment-resource-sheet-final.pdf)  
[www.peopleinaid.org/pool/files/publications/emergency-response-rosters-inotes-final.pdf](http://www.peopleinaid.org/pool/files/publications/emergency-response-rosters-inotes-final.pdf)