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INVESTOR IN PEOPLE

GUIDELINES FOR PANEL MEMBERS



**STAFF COMMISSION FOR
EDUCATION AND LIBRARY BOARDS**

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This information can be made available, on request, in alternative formats including large print, computer disc, email, Braille, audio-cassette and minority languages to meet the needs of those people who are not fluent in English. The document is also available on the Commission's website at www.staffcom.org.uk

1. INTRODUCTION

The Staff Commission for Education and Library Boards has a statutory responsibility for the oversight of matters connected with the recruitment, training and terms and conditions of employment of officers of boards and is committed to the provision of equality of opportunity, not only for those who are employed, but also those who seek to be employed within the Education and Library Service.

This guidance has been designed to provide practical assistance to boards in the use of fair and consistent systems in recruitment and selection. It outlines the various stages of the recruitment and selection process and contains examples of paperwork pro-forma which may be used. It recognises that all aspects of the recruitment and selection process interlink from job description, personnel specification, advertisement and shortlisting, to interview and appointment.

The Code of Procedures on Recruitment and Selection emphasises that all members of selection panels should be given training on sound selection procedures. This training should address equal opportunities legislation with particular emphasis on the board's policy in line with multi-dimensional equality of opportunity.

It should be noted that these Guidelines are not a substitute for training.

2. STAGES IN THE RECRUITMENT AND SELECTION PROCESS

The following diagram sets out the various stages in recruitment and selection. Each stage is considered in detail in the remainder of this section.

RECRUITMENT AND SELECTION FLOWCHART



2.1 JOB ANALYSIS

All recruitment and selection decisions should have a solid and demonstrable foundation. Whenever a post becomes vacant, it should normally be examined by the line manager, in consultation with the Human Resources Section, to ensure that it needs to be filled. The process should involve reviewing the job documentation to establish whether the job needs to be undertaken in the same way or if an alteration would be beneficial to the board and/or employee development requirements.

Once this analysis has been completed and the continuing need for the job has been determined, it is important that the duties and responsibilities of the job are documented and evaluated under the boards' Job Evaluation Scheme, if appropriate.

2.2 PREPARING THE JOB DOCUMENTATION

A job description, personnel specification, advertisement, application form and summary of terms and conditions of employment will be prepared.

Boards should make it clear that job documentation can be provided in alternative formats as appropriate.

Job Description

This will be a clear, written statement of the purpose, scope, duties and responsibilities of the post. It will describe what the postholder will be required to do. Generally, a job description should set out the following:-

- **Main Purpose**
This is a brief summary of the job, showing the main reason(s) why it exists and what it is expected to accomplish.
- **Reporting Relationships**
It is important to state clearly to whom the postholder reports and the employees they are responsible for.
- **Location**
This should detail the postholder's administrative base and any other locations where the postholder may be required to work.
- **Main Functions and Duties of the Post**
This is a list of the tasks and activities which must be carried out in order that the objectives of the post are met.

The job description should accurately reflect the specific duties of the post and should not contain unnecessary and unjustifiable conditions or requirements. For example, it should not imply that the post may be more suitable for women or for men. It should not use wording which implies unnecessarily that the post may not be suitable for candidates from any of the groups identified at paragraph 2.4 of the Code.

Personnel Specification

The content of a personnel specification derives from the duties and tasks contained in the job description. It involves translating the job description into a structured list of personal requirements and competencies.

The personnel specification will set out the requirements to be met by the person selected to fill the post. It may include educational standards/ qualifications, previous experience/training, knowledge, skills and personal attributes as appropriate to the post. The personnel specification should group the criteria into those which are essential and those which are preferred or desirable. Essential criteria are those which are necessary if the post is to be performed to satisfactory standards. Potential employees must meet the essential requirements specified. These form the minimum

shortlisting criteria. Desirable criteria are extras which may be helpful in assessing one candidate against another, but are not a prerequisite for the job. In the event of large numbers of applicants meeting the essential criteria, a panel may wish to apply the desirable criteria.

The development of a structured list of requirements and competencies is a crucial stage in the recruitment and selection process as it establishes the criteria which will be used to attract and select applicants. Care must be taken to avoid the inclusion of unnecessary or marginal requirements that may lead to discrimination or have an adverse impact on any of the groups identified at paragraph 2.4 of the Code.

Consider:-

- what personal, educational, physical, mental and other health requirements are necessary for performing the job bearing in mind (a) that such requirements may impact adversely and/or discriminate against persons with a disability, (b) that there is a need for flexibility as a consequence of the duty to make reasonable adjustments for persons with a disability;
- that requiring communication skills to be of a level higher than those which are actually necessary for the job may impact adversely and/or discriminate against persons with a disability and those from minority racial ethnic groups who are not fluent in written and/or spoken English;
- that qualification and experience requirements may impact adversely and/or discriminate against certain groups who have lacked opportunities for gaining the specified qualifications and experience, for example, young people, persons with a disability and persons with dependants;
- that lack of qualifications and experience may be overcome with the development of abilities through training and the provision of other reasonable adjustments; and
- that voluntary work experience may be as relevant as equivalent paid work experience.

-

Application Form

The purpose of the application form is to provide sufficient information to administer the selection process and to select those candidates who will be shortlisted for a vacant post. An application form should not, therefore, include questions which are irrelevant for the purpose of selection. An application form will be used for all posts to ensure that relevant objective, structured and standardised information is sought from applicants and that, as far as possible, irrelevant information is excluded from the selection process.

An application is valid only where the board has received the prescribed form duly completed on or before the advertised closing date and time. Care should be taken to ensure that people with disabilities are not discriminated against in the way in which applications are dealt with. It may be a reasonable adjustment, in particular cases, to allow a candidate with a disability to request and submit an application in a different format to that prescribed for candidates in general.

Advertisement

Advertisements should be kept as direct and brief as possible, consistent with conveying information effectively and attracting suitable applicants. Those who respond will be sent more detailed information which will include the job documentation referred to above, a summary of the general conditions applicable to the post, a summary of the board's Equal Opportunity Statement, together with the board's Equal Opportunities Monitoring Questionnaire.

Advertisements should normally contain the following information:-

- name of organisation;
- job title;
- brief summary of duties/responsibilities;
- a summary of the eligibility requirements, both essential and preferred;
- the equal opportunity statement;
- details of any special features e.g. job-share, fixed term;
- closing date;
- where and how to apply.

Affirmative/positive action statements should be considered and utilised in accordance with statutory provisions and board policy.

2.3 SHORTLISTING PROCEDURES

The shortlisting panel shall be constituted as specified at paragraph 4.3 of the Code. Where a board and/or the Staff Commission consider it necessary to appoint an Assessor, this should be carried out in accordance with the guidance contained at Appendix A of the Code. The Staff Commission may appoint an officer or member to be an Observer at a shortlisting and/or selection panel in accordance with paragraph 4.14 of the Code. The pro-forma documents on the Observer's Report on Proceedings of a Shortlisting and Selection Panel are contained at Appendices 11 and 12.

At the shortlisting panel meeting members will be supplied with copies of the following:-

- job advertisement;
- job description;
- personnel specification;
- a summary of the main terms and conditions of employment;
- Equal Opportunities Policy.

Such other written information which would enhance the panel's understanding of the duties, scope, organisation and content of the post may also be supplied.

It is important that the personnel specification is used as the basis for shortlisting candidates for further consideration. Shortlisting criteria, which are established from the personnel specification, should be criteria which can be measured/assessed using the applicant's details provided on the application form. As this is the first stage in the selection process it is important that the following action is taken:-

- the shortlisting criteria must be recorded prior to the examination of the application forms and must be wholly consistent with the advertised criteria which in turn must be consistent with the personnel specification. Criteria must be job related, justifiable and objective. An example of a Shortlisting Record Form is contained at Appendix 1;
- potential employees must meet the essential requirements as specified. These must always form the minimum shortlisting criteria;
- where experience is time bounded the relevant date for measuring the length of experience will normally be the closing date for applications;
- as part of the process of establishing the shortlisting criteria all words used in the criteria which could be subject to interpretation must be clarified or defined as to what they mean e.g. words like 'relevant', 'appropriate', 'recent', 'senior';

-

- decisions should be reached on the basis of information contained in the application form.

The shortlisting panel will consider all valid¹ applications received and apply the shortlisting criteria fairly and consistently.

Where a person with a disability is an applicant for a post the board will apply its Policy and Code of Practice on the Employment of People with Disabilities

In shortlisting the panel will firstly consider applications against the essential criteria. Should further shortlisting be required, the process should be conducted on a staged basis using the preferred/desirable criteria already established. Decisions reached in terms of those shortlisted will be recorded. An example is contained at Appendix 2. It is important that all decisions regarding eligibility and shortlisting are clearly documented.

All shortlisted candidates will normally receive at least seven days notice of the interview. Where this is not possible interview date(s) must be stated in the advertisement. When inviting candidates to interview boards are advised to ask if they have any specific requirements so that adequate preparations can be made for any reasonable adjustment to facilitate the interview arrangements for candidates with a disability.

It is important to apply standards/factors/criteria consistently to all, however, where an adjustment is required for an applicant this should be clearly documented.

Consideration should be given to making a reasonable adjustment for persons with a disability at the interview stage even if this may result in some inconsistency in the treatment of job applicants. The Code of Practice for the Elimination of Discrimination in the Field of Employment against Disabled Persons or Persons who have had a Disability cites many examples of the types of reasonable adjustments that may be made e.g., allowing a longer time for an interview to a person who is deaf and who is using a sign language interpreter to communicate.

The Race Relations Code of Practice for Employers for the Elimination of Racial Discrimination and the Promotion of Equality of Opportunity in Employment advises, for example, that applicants should not be disqualified because they are unable to complete an application form unassisted unless personal completion of the form is a valid test of the standard of English required for safe and effective performance of the job.

¹ Those applications received before the closing date in accordance with the requirements prescribed.

2.4 ASSESSMENT ARRANGEMENTS

Where selection tests and/or assessment exercises are being conducted they must be appropriate to the job, marked in a fair and consistent manner, supervised by persons trained in their use and monitored to ensure that they do not adversely impact on any of the groups identified at paragraph 2.4 of the Code. For example, selection tests which contain irrelevant questions or exercises on matters which may be unfamiliar to racial minority applicants should not be used e.g. general knowledge questions on matters more likely to be familiar to indigenous applicants. In the revision of such tests or the way the results of such tests/exercises are assessed, it may be necessary to take account of the specific needs of candidates with a disability, except where the nature and form of the test/exercise is necessary to assess a matter relevant to the job. It may be, for instance, a reasonable adjustment to accept a lower 'pass rate' for a person whose disability inhibits performance in such a test/exercise.

The Staff Commission will provide assistance with assessment arrangements where required.

2.5 INTERVIEW PROCEDURES

The interview panel should normally comprise those persons who constituted the shortlisting panel. Only in exceptional circumstances should a substitute be appointed. In such circumstances the change and reason for it must be recorded and the substitute must be fully briefed on decisions taken by the shortlisting panel.

Preparation for Interview

It is essential that the interview is pre-planned to ensure that it has a direction and focus. The procedures should operate so as to ensure the appointment of the best person for the job. At pre-interview stage the panel should:-

- decide on the weighting to be allocated to each criterion based on the criteria already recorded at the shortlisting stage. An example pro-forma is contained at Appendix 6;
- prepare and record the core questions, an example pro-forma is contained at Appendix 7. Questions should relate to the job description and personnel specification and be designed to assess candidates' suitability in relation to the pre-determined criteria;
- the core areas of questioning required of candidates should be discussed and allocated, either to each panel member, the Chairperson or the Assessor as appropriate. In devising core questions 'model' or suggested answers should be prepared to ensure that differing standards are not applied. An example pro-forma is contained at Appendix 7.

-

In establishing interview arrangements it is important to consider:-

- the time at which interviews will take place;
- the suitability of the venue;
- the length of time for each interview ensuring all candidates are given the same opportunity to perform;
- the time required for panel assessment and completion of records; and
- any reasonable adjustments required when establishing the interview arrangements.

Conducting the Interview

Prior to the commencement of the interviews, the Human Resources representative and/or the Chairperson will ensure that each member of the panel is provided with a copy of the selection documentation including application forms, personnel specification, job description, assessment sheets and the agreed core questions.

Each panel member should be aware of his/her role and the questioning sequence which has been agreed.

The Chairperson should welcome the candidate, introduce him/herself and panel members, clarify to the candidate the post on offer and generally describe the interview process and explain that panel members will make notes.

All candidates must be given an equal chance to demonstrate their abilities and consistent standards must be applied throughout the interview.

In pursuit of this objective, the panel must ensure that each candidate is assessed against the established criteria, and that the pre-defined core questions are asked of all candidates. The panel may need to probe candidates further for job-related information and this can be achieved by asking objective supplementary questions in order to establish clearly the relevant information. Such questions must be kept objective and relevant to the post because, if not, they can undermine a candidate's confidence that he/she has been, or will be, treated fairly. However, it is also important that care is exercised when probing candidates to ensure that all candidates are treated fairly and consistently and that none are advantaged or disadvantaged in the process.

The panel may need to ascertain if candidates can meet special conditions of employment such as overtime, unsocial hours etc. This however is only permissible where such conditions have been clearly stipulated on the Personnel Specification. Panel members seeking such information should ensure that the relevant information is obtained objectively and consistently by asking the same job-related question of every candidate.

The Chairperson should have planned his/her closing remarks. This should include offering all candidates the opportunity to ask questions of clarification and briefly add any points which they consider significant and which were not raised during the course of the interview.

Throughout the interview, panel members should make notes on candidates' responses to the questions so that they can justify their evaluation or marks on the assessment form. However, excessive note taking during the interview should be avoided as it could be off-putting for the candidate. Example pro-forma are contained at Appendices 4 and 5.

At the conclusion of each interview all panel members should complete an individual assessment form in respect of each candidate. Candidates should be assessed against the selection criteria rather than against each other. An example assessment form is contained at Appendix 5.

After the Interview

After the final interview and the completion of individual assessment forms by each panel member the Chairperson should:-

- invite the Assessor, where appointed, to report on the competence of each candidate and how they did or did not meet the criteria specified;
- invite each panel member to give his/her assessment of the candidates interviewed. If, following the discussion, a member amends marks, this should be recorded, together with the reasons for the changes;
- seek to agree the best person for the post, taking account of the Assessor's report, where appropriate, and the assessment given by individual panel members;
- the Chairperson or Human Resources representative should record the scores and ranking by each voting panel member. An example pro-forma is contained at Appendix 8.

A recommendation from an interview panel may include a list of reserve candidates in order of suitability, in accordance with paragraph 4.11 of the Code.

Where references have been sought they should be referred to only after a panel has determined a recommendation to appoint.

The Chairperson should ensure that the decisions reached are recorded and that all appropriate documentation is collected and passed to the Human Resources representative. An example pro-forma is contained at Appendix 9.

All candidates should be informed, in writing, of the outcome of the interview process.

Retention of Records

The Fair Employment Code of Practice (paragraph 6.2.42) recommends that monitoring information on applicants should be retained for a period of 3 years from the date of receipt of the application.

Recruitment documentation should be retained for at least 3 years by the Human Resources Section or Chief Executive's office. The documents retained should be a complete file from the drafting of the job description, personnel specification and advertisement through to the offer and acceptance of the job. It should include hand written notes of the members of the selection panel and marking sheets as well as the formal documents.

Where a complaint is made about a recruitment exercise then the documentation should be retained until the conclusion of the matter.

APPENDICES

1. Example of a Shortlisting Record Form
2. Example of a Shortlisting Assessment Form
3. Example of a Report of Proceedings of a Shortlisting Panel
4. Example of a Panel Member's Assessment Form
5. Example of an Assessment Form
6. Example of Weighting Criteria, Marking and Duties of Panel Members
7. Example of a Record of Core Questions
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EXAMPLE OF A SHORTLISTING RECORD FORM

Post: _____

Date of Meeting: _____

Panel Members

Voting

Assessor (if applicable)

(i) _____

(ii) _____

In attendance

Criteria for Shortlisting:

This should be determined before applications are examined.

- Essential:**
- 1. _____
 - 2. _____
 - 3. _____
 - 4. _____
 - 5. _____

- Preferred:**
- a. _____
 - b. _____
 - c. _____
 - d. _____
 - e. _____

Notes:

Signed _____
Chairperson of Panel

Date

EXAMPLE OF A SHORTLISTING ASSESSMENT FORM

PART 1

Post: _____

Date(s) of Shortlisting: _____

Applicant's Name	Shortlisting Criteria										Shortlisted		Comments
	Essential					Preferred					Yes	No	
	1	2	3	4	5	a	b	c	d	e			

Signed _____
Panel Member

_____ Date

EXAMPLE OF A REPORT OF PROCEEDINGS OF A SHORTLISTING PANEL

(To be completed by the Chairperson after shortlisting)

PART II

Names of Persons Shortlisted

Note any checks required on candidate information:

Signed _____
Chairperson of Panel

Date

EXAMPLE OF A PANEL MEMBER'S ASSESSMENT FORM

Post: _____

Candidate: _____

Assessor: _____

Interview Commenced: _____

Interview Concluded: _____

Criterion	Questions	Notes

Signed _____

Panel Member

Date

EXAMPLE OF AN ASSESSMENT FORM

Post: _____

Name of Candidate: _____

Criterion	Questions	Notes	Possible Score	Actual Score
Attainments: (Qualifications)				
Attainments: (Experience)				
Knowledge:				
Skills:				
Personal Qualities:				
			Total 100	Awarded
			Rank	

Marks out of	Poor			Average		Good		Excellent		
10	1	2	3	4	5	6	7	8	9	10
15	2	3	5	6	8	9	11	12	14	15
20	2	4	6	8	10	12	14	16	18	20
25	3	5	8	10	13	15	18	20	23	25
30	3	6	9	12	15	18	21	24	27	30

Signed _____

Panel Member

Date _____

EXAMPLE OF WEIGHTING CRITERIA

Weighting criteria normally involves the use of a numeric system to establish the greater or lesser relevance of each of the criteria.

This system may be based on a maximum allocation of 100 marks which should be distributed among the criteria headings according to the significance of the criteria. (Simply the higher the mark out of 100 for a criterion, the higher the relevance.)

MARKING

Marking simply involves selection from the table at Appendix 5 a suitable mark to reflect your judgement of how the candidate meets each criteria, e.g. experience has been weighted high with an allocation of 30 marks, if you believe a candidate is slightly below average the mark may be 12.

- Marks given should be totalled. Candidates should then be ranked in order of preference according to the marks given. (Note: Where two candidates have the same mark, give each the same rank and then skip a place, e.g. 1,2,2,4,5,6).

DUTIES OF PANEL MEMBERS

At interview each panel member should:-

- make notes on each applicant against each of the criteria in the remarks column and on additional paper if necessary;
- fully complete an assessment sheet for each applicant.

During the post-interview discussion the Chairperson of the panel will ensure that the views of all panel members are given consideration. Where a panel member changes the ranking/mark originally awarded a note should be made by the panellist giving the reason for doing so.

By following these guidelines a panel member will have a record of their thinking and should have a sound basis for justifying his/her decision in the event of there being a challenge to the appointment. It should be noted that such challenges often come to the fore months and sometimes years after an appointment.

EXAMPLE OF A RECORD OF CORE QUESTIONS

Post: _____

Date of Meeting _____

Ensure that the questions are relevant to the job and designed to capture the information required to assess the candidate against the criteria specified.

Criteria	Core Questions at Interview	Suggested Areas to be Raised in Answers ²
Attainments (Qualifications)	1.	1.
	2.	2.
Attainments (Experience)	3.	3.
	4.	4.
Knowledge	5.	5.
	6.	6.
Skills	7.	7.
	8.	8.
Personal Qualities	9.	9.

Probe Questions: Panels should try to maintain a record of additional probe questions posed to candidates on the candidate's assessment sheet.

Signed _____

Chairperson of Panel

Date _____

² It is recognised that not all questions will have suggested answers which can be specified on this form i.e., scenario type questions which assess analytical ability etc.

EXAMPLE OF A SUMMARY OF PANEL MARKS FORM

Post: _____

Date of Meeting: _____

Name of Candidate	Panel Members							
	Name		Name		Name		Name	
	Mark	Rank	Mark	Rank	Mark	Rank	Mark	Rank

NB Rank should reflect marks awarded

Signed: _____
Chairperson of Panel

Date

EXAMPLE OF A DECISION OF PANEL FORM

Post: _____

Date: _____

Recommended Candidate: _____

If applicable, details of reserve candidate(s):

1st Reserve _____

2nd Reserve _____

Any other recommendations e.g. re-advertisement, re-interview some/all candidates:

Record of Post-Interview Discussion:

The Chairperson/Human Resources representative should record all significant discussion points which arose during the decision making process, including how the decision was made, e.g. elimination process, discussion on panellists' markings, rankings, details of voting where the panel was not unanimous. (Continue on a separate sheet if required).

Signed _____
Chairperson of Panel Date

EXAMPLE OF AN EMPLOYMENT REFERENCE FORM

Name: _____ **Post Title:** _____

Address: _____

_____ **Post Code:** _____

What is your relationship with the candidate?

Over what period of time was the candidate with your organisation?

From: _____ To: _____

Please indicate the candidate's position in your organisation and the reporting arrangements (if applicable):

Position/Job title _____

Reports/Reported to _____

Responsible for _____

Employees: _____ Budget _____

Is there any reason, to your knowledge, why the candidate may not be suitable?

YES/NO

If YES, please state:

Please indicate your assessment of the applicant in relation to the following qualities:

Satisfactory

Unsatisfactory

Job Performance

Working relationship with managers

Working relationship with peers

Attendance Record³

Flexibility towards work and colleagues

Ability to communicate

Commitment

If you have given an unsatisfactory rating please provide sufficient factual information for us to establish the validity and reliability of your rating.

³Where information provided under this heading includes a reference to disability or maternity absence further clarification may need to be sought and care should be exercised on the interpretation of such information.

STAFF COMMISSION FOR EDUCATION AND LIBRARY BOARDS
OBSERVER'S REPORT ON PROCEEDINGS OF A SHORTLISTING PANEL

Board: _____

Date/Time of meeting: _____

Venue: _____

Vacant Post: _____

Members of Panel

Chairperson: _____

Members: _____

Number of Applications to be considered: _____

Names of Persons shortlisted:

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Any other recommendation by the Panel:

STAFF COMMISSION FOR EDUCATION AND LIBRARY BOARDS

OBSERVER'S CHECKLIST – SHORTLISTING PANEL

	YES	NO
Was this post advertised in accordance with the Code?		
Is the panel properly constituted?		
Have panel members been trained in selection techniques?		
Has the panel determined shortlisting criteria?		
Do all the shortlisted candidates meet the shortlisting criteria?		

Recommendation of Panel (unanimously or by votes to)

(1)* That the appointment shall be offered to: _____

(2)* That in the event of the appointment not being taken for any reason by the above-named, it shall be offered to: _____

(3)* That if the post is not filled as above, it shall be offered to:

In the event of the person named at (3) not accepting the offer of appointment the post shall be re-advertised.

(4)* That the post shall not be offered to any of the candidates but shall be re-advertised.

*Delete as appropriate

Any other recommendation by the Panel: _____

OBSERVER'S COMMENTS ON PROCEDURES

1. Was the panel properly constituted in accordance with the Code of Procedures on Recruitment and Selection? YES/NO

2. Were all other procedures fully observed? YES/NO

3. Items drawn to the attention of the Panel (if applicable)

SIGNED _____ **DATE** _____

Notes:

- 1. This form should be returned to the Chief Executive of the Staff Commission as soon as possible after the conclusion of the selection panel.
- 2. The Staff Commission has decided that the comments on observers' reports under items 1 – 3 will be notified to the Staff Commission and issued to boards for information.
- 3. The Chief Executive may ask observers to complete a questionnaire on an annual basis to provide general information on the implementation of the Code of Procedures on Recruitment and Selection.

STAFF COMMISSION FOR EDUCATION AND LIBRARY BOARDS

OBSERVER'S CHECKLIST – SELECTION PANEL

	YES	NO
Has shortlisting taken place?		
Is the panel properly constituted?		
Have panel members been trained in selection techniques?		
Is there an interview plan, e.g. has the panel an agreed structure for questions?		
Have all candidates been given an opportunity to respond to questions put to them, or ask questions of information from the panel?		
Where references are used, have all applicants been treated fairly?		
Are you satisfied that the process of elimination of applicants has been carried out in a satisfactory manner?		
Has the Assessor been given an opportunity to question the candidate or make his/her comments known?		