Guidelines

Title: RECRUITMENT PLANNING CHECKLIST

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INTRODUCTION
Developing a plan for your recruitment that considers the complete process from start to end needn’t restrict your ability to respond swiftly or recruit flexibly. In fact taking time to get organised at the start will enable you to recruit faster and more effectively.

The checklist below poses a series of questions that you may find useful asking yourself in preparation, before starting the recruitment process. Not all of the questions may be relevant or require answering for all roles. However, asking them will help you consider the full extent of your recruitment plan.

If you would like assistance in working through the questions to create your recruitment plan, please contact your HR Manager.

Questions marked [e] highlight information that is required when registering a vacancy in the University’s e-Recruit system. This information will ultimately enable HR to generate a contract for the successful candidate.

1. BEFORE YOU START
☐ Have you experience of (a) recruitment (b) at Southampton?
☐ Do you have an overall understanding of the University recruitment policy, process, and the roles and responsibilities within it?
☐ Would you benefit from recruitment training in general or in a specific area (eg: avoiding discrimination)?
☐ Do you understand the role of HR in the recruitment process and how we can/will support you?

2. GETTING STARTED
☐ How has this vacancy come about?
☐ Is this an existing post? [e]
☐ Does the post have a title? [e]
☐ What is the post type? [e]
☐ Is this a named researcher post? [e]
☐ Does the post have a level/grade? [e]
☐ Which Faculty or Professional Services Group (PSG) will this post be attached to? [e]
☐ Which division and section within the Faculty or PSG will this post will be attached to? [e]
☐ What pay range and benefits will be available – eg: bonus, parking, special training opportunities, etc?
☐ How many vacancies are there for this post? [e]
☐ Could this be an opportunity to look at the structure of the whole team and do things differently?
☐ Have you thought about existing employees and opportunities for promotion?
☐ Is there authorisation and budget available for this recruitment to begin?
☐ Does this include budget for advertising and engaging prospective employees, as well as salary?
☐ Is there a reason why you will not be using the e-Recruit system to support your recruitment process?
☐ Is this a politically restricted post?
☐ Do you anticipate potential difficulties in recruiting to this particular post?
☐ Do you have any concerns about the recruitment process at this stage?
☐ Would you find it useful talking to HR to help develop your recruitment plan?
3. **DEFINING THE ROLE**
   - Is there a job description and person specification available for this post (or type of role)? [e]
   - Has it been evaluated?
   - Does it reflect the true nature of the role and avoids discrimination?
   - What experiences and competencies are non-negotiable and where can you afford to be more flexible?
   - What type of employment is being offered and would you consider part time or job sharing? [e]
   - How will this post be funded? [e]
   - Is this role suitable for a redeployee or internal candidate – do you know of anyone?
   - Will this vacancy attract candidates requiring a certificate of sponsorship?
   - Is a disclosure and barring service (DBS) check – formerly criminal records bureau (CRB) check – required for employees undertaking this role? [e]
   - Will relocation packages be offered for this post? [e]

   Guidance and further information about [defining the role](#).

4. **SPECIFICS ABOUT THE POST**
   - If the post type is ERE, Clinical* or MSA*, what is the post class? [e]
   - Where will the post be located? [e]
   - If located overseas, are you aware of the implications this might have for the prospective candidate?
   - If an MSA post, will additional access to a Faculty or Academic Unit be required? [e]
   - If yes, where is access required (which code)? [e]
   - Do you know who will this post report to – what is their name and post number? [e]
   - Is this an externally funded research group post? [e]
   - Do you know the subproject code(s) for the funding of this post? [e]
   - Will the employee be paid on an hourly rate? [e]
   - If yes, what rate per hour (fixed) or range per hour is available? [e]
   - Is this post involved in clinical work? [e]
   - If yes, is this an NHS joint contract, what grade is the contract, and what is the required healthcare speciality? [e]

5. **YOUR HIRING TEAM/PANEL**
   - Do you know the size and composition of the hiring team?
     - Hiring manager?
     - Interview panel chair?
     - Interview panel assistant?
     - Other members of the interview panel?
   - Is it appropriate and going to be effective?
   - Is there a balance of sex and ethnicity on the interview panel?
   - Who will be your named contact if a candidate would like an informal discussion about the specifics of the role before applying?
   - Would it be appropriate for a member of HR to join your interview panel?
   - Are you and your hiring team aware of the [recruitment guidelines](#) available on the HR website?
   - Would any members of your hiring team benefit from some additional training or guidance about the recruitment process?

6. **TIMEFRAME**
   - What is the timeframe you are working to for this recruitment and why?
   - Do you have a preferred date for the new employee to start? [e]
   - Do you have a date in mind for the interviews/selection to take place?
   - If yes, is this date held in the hiring team/panel's diaries?

   How long should my recruitment take?
7. **ADVERTISING**
   - Have you reviewed the advert template available as a starting point for creating your job advert and what it should include?
   - Do you have a preferred date for the advert to go live? [e]
   - Will you be advertising internally and externally?
   - Will the advert be live for 28 days to allow for recruitment from candidates who may require a certificate of sponsorship?
   - In addition to the University’s usual placement, where else would you like this vacancy to be advertised? [e]
   - Do you know the subproject code to be used if a charge is incurred for advertising? [e]
   - Can you supply additional information for the candidates receive to help them make an informed decision about applying for the role (further particulars)?
     - About the department – including staff structure, office location, promotional material, facts and figures?
     - Welcome paragraph from the hiring manager/departmental head?

Guidance and further information about advertising.

8. **SHORTLISTING**
   - Do you have a sense of how many applications you would expect to receive for this vacancy?
   - What questions could you ask at the application stage to filter out weaker candidates and help create a list of quality candidates to select from?
   - Is there a non-negotiable role requirement that could help remove unsuitable applicants at the very start?
   - Are you aware that the e-Recruit system will prompt you to shortlist and record your decisions?
   - Will you book time with the panel to review the shortlist as quickly after the closing date as possible?
   - Do you understand about the Two Ticks scheme and considerations to be given to applicants who are disabled?

Guidance and further information about shortlisting.

9. **INTERVIEWING & SELECTION**
   - Do you have any thoughts about the most appropriate format for interviews and selection?
   - Will there be any special requirements – such as presentations, testing, etc?
   - Will you reimburse interview candidates for expenses incurred to attend the interview?
   - Are you clear on what needs to be recorded during the interview/selection stage, and why?
   - Will you or a member of the panel be willing and able to provide unsuccessful candidates with feedback after a decision has been taken?

Guidance and further information about interviewing and selection.

10. **PRE-EMPLOYMENT CHECKS**
    - Do you understand what checks are required prior to an offer being made and why?
    - Who will be completing the document checks and certification at interview?

Guidance and further information about pre-employment checks.

11. **THE OFFER, APPOINTMENT & INDUCTION**
    - Are you comfortable with your understanding of the offer stage and who does what?

Guidance and further information about the offer, appointment and induction.
Post types:
- CAO - Community & Operational,
- ERE – Education, Research & Enterprise,
- MSA – Management, Specialist & Administrative,
- TAE – Technical & Experimental,
- Clinical,
- Research Nurse,
- Other

Employment type:
- Casual,
- Full time - permanent,
- Full time – fixed term,
- Part time – permanent,
- Part time – fixed term,
- Term time – permanent,
- Term time – fixed term

Post class – ERE & Clinical:
- Academic mixed,
- Academic research,
- Academic teach,
- Education development,
- Enterprise,
- Part time academic,
- Research Nurse

Post class – MSA:
- Administrative/support,
- Information technology

Additional access codes:
- BJ Biological Sciences,
- F1 Business and Law,
- EB Chemistry,
- MJ Civil Engineering & the Environment,
- GR Communications,
- BB Corporate Services,
- CD Development Office,
- CJ Education,
- FP Electronics & Computer Science,
- F2 Engineering and the Environment,
- Kk Engineering Sciences,
- TD Estates & Facilities,
- TX Faculty Operating Offices,
- RR Finance,
- WR Geography,
- F3 Health Sciences,
- DD Human Resources,
- F4 Humanities,
- KR Institute of Sound & Vibration Research,
- NP International Office,
- JF iSolutions,
- BZ LATEU,
- JJ Law,
- KX Library,
- TR Management,
- PJ Mathematics,
- F5 Medicine,
- HK National Oceanography Centre (NOC),
- F6 Natural and Environmental Sciences,
- HN Ocean and Earth Science,
- EH Optoelectronics Research Centre,
- F7 Physical and Applied Science,
• WF Physics & Astronomy,
• PI Professional Services – CFO,
• P2 Professional Services – R & COO,
• JW Psychology,
• TW Research & Innovation Services,
• F8 Social and Human Sciences,
• CC Social Sciences,
• WT Southampton Statistical Research Institute,
• GX Student & Academic Administration,
• EW Student Services

**University standard job vacancy placement:**

• Job Centre Plus,
• My Southampton Jobs,
• University of Southampton website,
• Jobs.ac.uk