Resourcing Guide

Human Resources
Resourcing Guide - Contents

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1. Introduction

This booklet provides you with a quick but comprehensive reference guide to all aspects of the recruitment and selection process. A web-based version of all the information in this booklet can be found at www.bristol.ac.uk/hr/resourcing

The principles and procedures outlined in this document apply to all University of Bristol vacancies for which a recruitment and selection process is carried out, except where otherwise stated.

Contacts for advice and guidance:

- Your Faculty or Divisional HR Team
- Richard Boyce, OD Manager Resourcing
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Web address for information:

www.bristol.ac.uk/hr/resourcing
2. Equality and diversity in recruitment and selection

2.1 What diversity means

Equality of opportunity can seem quite a complex area and recruiters and employers can often look at it from a defensive, legal compliance position.

Diversity takes a wider and more positive outlook. There is still a need to ensure discrimination and stereotyping play no part in the recruitment and selection process. But as important is valuing differences between people and understanding the positive benefits for the University of employing a diverse range of talented people.

A positive approach to diversity allows you to select the best person for the job based on merit alone and free from bias on the grounds of factors such as age, disability, gender or race that are not relevant to the person’s ability to do the job.

Employers that take this approach are more likely to be seen as a fair, positive and progressive place to work by the diverse society that they are part of. This philosophy underpins the University’s Equality and Diversity policy.

"Everyone is different and unless employers take diversity seriously they will fail to recruit, retain and engage the commitment of the talent needed to sustain and improve performance" (Chartered Institute for Personnel and Development)

The legal angle does need to be taken seriously though as there are an increasing number of specific areas of discrimination covered by legislation. Decisions that fall foul of the law can be costly for the University in terms of bad publicity and financial penalties but also time-consuming and stressful for the individuals involved, and that could be you!

You don’t need to be an expert on all aspects of anti-discrimination legislation and case-law but you do need to understand:

- the principles of what constitutes potentially direct and indirect discrimination in the recruitment process;
- and why a positive approach to diversity is the best way to avoid problems and attract a wider range of suitable candidates.

Avoiding discrimination and adopting a positive approach to diversity

Following the principles and practices outlined in the University’s Guidance on the Recruitment and Selection Process will help you to put this into practice. You will also find it useful to consider the information on the general legal position outlined below and some specific and practical actions to avoid discrimination and adopt a positive approach to diversity.
2.2 The general legal position

Some key facts

- The Equality Act 2010 protects people in employment from discrimination, victimisation, harassment or any other detriment because of any of the following ‘protected characteristics’ – disability, gender reassignment, marriage or civil partnership, pregnancy and maternity, race, religion or belief, sexual orientation, sex (gender), and age.

- Legislation covers direct and indirect discrimination, as well as discrimination by association or perception.

- Burden of proof is with the employer to show that they haven’t unlawfully discriminated on the grounds of the factors covered by the legislation.

- Individuals can make a claim to an Employment Tribunal, where the overall average award in discrimination cases is £20k. There is no upper legal limit on the amount of compensation that can be awarded in such cases.

- Individuals who take discriminatory actions or decisions are potentially accountable as well as the organisation, provided that the organisation can demonstrate it took all reasonable steps to prevent the employee from discriminating, harassing or victimising someone.

- The Equality and Human Rights Commission was formed in October 2007 to promote and monitor best practice and legal compliance in all areas of diversity and equal opportunities. It is a new commission incorporating the former Equality Opportunities Commission, Commission for Racial Equality and the Disability Rights Commission.

- The Commission produces Codes of Practice. How well employers have adhered to the Codes is considered by Tribunals in deciding outcomes of cases.

Direct discrimination

Definition: Less favourable treatment of a person compared with another person because of a protected characteristic. The new definition of direct discrimination extends protection based on association and perception, already applicable to race, sexual orientation and religion or belief, to include age, disability, gender reassignment, sex and pregnancy and maternity.

Examples:

- not employing a woman because of concerns that she might want to start a family.
- not considering a disabled person without looking at whether they meet the selection criteria and whether any reasonable adjustments can be made.
- not employing somebody because staff believe him to be homosexual, irrespective of whether he is homosexual or not – this is still direct discrimination because of sexual orientation.
- not considering a person for a job because they care for a disabled child
Indirect discrimination

**Definition:** Occurs when a provision, criterion or practice is neutral on the face of it, but its impact particularly disadvantages people with a protected characteristic, unless the person applying the provision can justify it as a proportionate means of achieving a legitimate aim. Indirect discrimination applies to all of the protected characteristics, apart from pregnancy and maternity.

**Examples:**

- using word of mouth and informal networks as the primary source for senior academic appointments is likely to disadvantage groups who are currently under-represented at this level, e.g. black and minority ethnic (BME) or female candidates.
- including a specific academic qualification in the selection criteria, excludes those who have achieved an equivalent standard of knowledge and skill through another, equivalent route.

**Positive action not positive discrimination**

The legislation encourages employers to take **positive action** to ensure they can recruit and retain people from under-represented groups as long as this does not mean less favourable treatment for other people. For instance:

- Including statements encouraging applications from under-represented groups.
- Targeting advertising to reach under-represented groups.
- Promoting employment opportunities at job-fairs and open days in under-represented communities.
- Encouraging more 'women and family friendly' flexible-working patterns.

But **positive discrimination**, treating those from under-represented groups more favourably to the exclusion of others is not lawful.

**Other relevant legislation**

**Asylum and Nationality Act 2006**

- Introduced a new [Points Based System (PBS)](#) for economic migration into the UK.
- Introduced a legal responsibility for employers to prevent illegal migrant working in the UK.
- Stipulates the civil penalties that employers are liable to pay for committing the offence of employing an illegal migrant worker.
- Recommends that employers conduct basic document checks on *every* person they intend to employ to ensure that they only employ people who are legally entitled to work in the UK, and to establish a legal ‘excuse’ against liability for payment of a civil penalty if an illegal worker is erroneously employed.
- Also covers employer responsibilities for tracking and monitoring the immigration status of migrant workers once employed, and reporting unauthorised absence.
Rehabilitation of Offenders Act 1974

- Anyone with a spent (i.e. time expired) criminal conviction does not have to declare it when applying for a job and it is unlawful for the employer to discriminate on the grounds of the conviction.
- It is lawful for an employer to request that applicants declare unspent convictions and to take these into account in a fair and transparent way before offering employment.
- Spent convictions can only be considered where a job requires a DBS check due to working with children or vulnerable adults.

The University has a policy and procedure on employing people with criminal records and DBS checks.

European Human Rights Convention

Encompasses all of the above within its wide remit.

There are several other pieces of legislation that make it unlawful to treat different kinds of workers unfavourably to others in a number of areas relating to employment, including:

Maternity and Paternal Leave Regulations 1999

Part-time Workers (Prevention of less favourable treatment) Regulations 2000

Fixed Term Workers Regulations 2002

2.3 Diversity checklist

You may find the following practical information useful. If you have a specific concern or query about a diversity issue it is often best to discuss it with your Faculty/Divisional HR Team.

General

- 'Reality check' your job and person specifications, selection criteria and advert wording to ensure they do not include any content that is potentially discriminatory or unreasonably excludes certain groups without justification.
- Avoid making assumptions about people based on personal appearance, name, how long ago they were at school or university, family or caring responsibilities etc. Focus on assessing each candidate objectively on how well they meet your selection criteria based on the evidence they provide to you.
- If someone you invite for interview can't make the date set, make sure you at least consider whether you can re-arrange the interview to accommodate them. If it's because of child-care responsibilities, a disability issue or even a religious holiday then you may be potentially discriminating.
Age

- Do not include age-related criteria in job and person specifications, selection criteria and advert wording. Avoid words like "young", "recently qualified" and "mature", as these could potentially be seen to be discriminatory to older or younger workers and therefore in breach of the Equality Act 2010.

- Avoid specifying a required length of experience. Using such a requirement, particularly where it is for a lengthy period, could potentially be seen to be discriminatory against both younger workers and women who have taken career breaks when having children. Instead, focus on what type of experience you are looking for rather than an arbitrary figure for how long the person has been doing it, which is unlikely to be a good indicator of performance in any case. For instance, "Significant experience of providing a service in a busy, customer-focused environment" rather than "Three years customer service experience".

- The concept of a default retirement age (which is currently age 65) has been abolished by the Government and it is therefore unlawful to reject job applications from candidates who are over 65; such applicants should be treated in the normal way - age-related factors must not be used as a criteria for non-selection.

- The University does not have a ‘minimum’ employment age, other than that imposed by legal restrictions on the number of hours those in full time secondary education can work. The University’s policy on employing young people outlines the relevant legal and health and safety requirements when employing under 18’s.

- Chronological information on education and work experience can be useful to establish whether a candidate has any gaps in their work/education history. However, such information also indicates a person’s general age and it is important not to consciously or unconsciously let the candidate’s age affect your judgment as to their suitability.

Disability and health

- If a candidate has applied using alternative formats (e.g. audio-tape) treat them in the same way as other applications.

- Ensure that any invitation to interview letters ask all candidates about any adjustments due to a disability that may have to be made to the interview process.

- If a candidate that you have short-listed has specified in their application that they have specific requirements to enable them to attend an interview, complete a test or another part of the selection process because of their disability, ensure that the required adjustments are fully considered; the expectation will be that if the adjustment is 'reasonable' then it should be made. You should contact your Faculty/ Divisional HR Team for advice on specific cases.

- The Equality Act 2010 limits the circumstances when health-related questions can be asked before a job offer is made. Health-related questions can be asked to:
  - determine whether reasonable adjustments need to be made to the selection process
  - determine whether an applicant can carry out a function that is intrinsic to the job (such as manual handling)
  - monitor the diversity of job applicants
  - take positive action to assist disabled people
  - confirm that a candidate has a disability where this is an occupational requirement
• Under the Act it is no longer permissible to ask questions that aim to establish how many days of sickness absence an applicant has accrued during previous employment prior to the candidate being made a conditional or unconditional offer of work. This question must not be included on any application forms, reference requests or addressed at interview.

• Once a job offer has been made, appropriate health-related questions can be asked, provided that they are linked to the job requirements. However, this needs to be approached sensitively and as a ‘fact-finding’ rather than a judgmental process, i.e. to fill in the gaps rather than as any kind of medical assessment. It should be made clear during the discussion that they may be subject to an occupational health check; and that this is the point at which an informed and professional assessment of the potential impact of the condition or disability on the job will be made. In limited circumstances, this may include making conditional offers subject to a satisfactory occupational health check.

• When you assess an applicant’s suitability for the job you must take account of how reasonable adjustments could enable them to do the job. If, after taking reasonable adjustments into account, they would not be the best person for the job, you do not have to offer it to them.

• Remember to contact your Faculty/Divisional HR Team when you are considering a candidate with a disability. There is expert advice and financial support on the many practical options for making reasonable adjustments for people with disabilities, e.g. from the Access to Work Scheme run by the Employment Service.

3. Planning and Preparation

3.1 Thinking about your needs

If you have a vacancy or other resourcing need then you should contact your Faculty or Divisional HR Team in the first instance to discuss how best to take this forward and the support that HR will provide.

You will need to put some thought into what your needs are and the best way to meet them. This should involve considering a number of questions with colleagues in your team and your line manager:

• If this is a new role, what are the main job purpose and objectives, responsibilities and tasks and what sort of experience skills and attributes will you be looking for?

• If this is an existing role, are there any changes that need to be made to the tasks and responsibilities to ensure the job will be fully effective?

• Rather than recruiting a new person, are there opportunities for developing the skills and experience or redesigning the jobs of existing staff?

• If this cannot be justified as a full time, permanent contract post, what type of contract of employment or work pattern is likely to be most appropriate?

• If this is an academic or research role, what will be the appropriate academic career pathway and profile level?
### 3.2 Obtaining authorisation to recruit (and other contract changes)

Significant progress has been made towards creating core staffing establishments linked to the annual budget setting process and academic review and therefore the process of approval for recruitment and staffing requests generally has now been updated.

The authority levels for recruitment activity and other staffing changes are as detailed below:

<table>
<thead>
<tr>
<th>Staff Type</th>
<th>Authority level Within Establishment</th>
<th>Authority Level Outside of Establishment</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>(Core Funded)</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Academic</strong></td>
<td>Dean</td>
<td>Establishment Review Group</td>
</tr>
<tr>
<td><strong>Support Staff (Faculty Specific)</strong></td>
<td>Faculty Manager</td>
<td>Establishment Review Group</td>
</tr>
<tr>
<td><strong>Technical Staff</strong></td>
<td>Faculty Manager</td>
<td>Establishment Review Group</td>
</tr>
<tr>
<td><strong>Support Staff Divisions</strong> <em>(Including Student Services and Information Services)</em></td>
<td>Process Owner/Divisional Head</td>
<td>Establishment Review Group</td>
</tr>
</tbody>
</table>

*All externally funded posts are authorised at Faculty level.*

Any staffing requests should be discussed with your Faculty/Divisional HR and Finance teams in the first instance.

A [staffing request form](#) should be completed for all requests, (core funded academic and support posts and externally funded post) and forwarded to your Faculty/Divisional HR team who will be responsible for ensuring that the appropriate levels of approval are obtained.

If the request changes a core funded establishment post or increases the establishment, your HR Team will arrange to submit this to the Establishment Review Group for approval. The Group meets monthly and consists of the Deputy Vice Chancellor, Financial Director, Registrar, HR Director.

**Maternity Cover**

Like for like cover approval is with the Dean, Faculty Manager, and Process Owner/Divisional Head as appropriate (as above). If the cover increases the establishment then approval is required from the Establishment Review Group.
Temporary Staff

Arrangements for up to two months approval is with the Dean, Faculty Manager, Process Owner/Divisional Head as appropriate (as above). Arrangements of over two months should be reviewed on an individual basis with the HR/Finance team and fixed term contracts should be used as an alternative wherever possible.

We expect to review this approach on a regular basis and will update accordingly.

3.3 Describing the job and the person

Further particulars

New or existing jobs will need to have been described in detail on a job description template in order to have their grade confirmed through job evaluation or role profile matching, as outlined in the next section, Agreeing the grade. Research and Teaching roles will also have been placed on the appropriate academic career pathway and profile level.

The information provided in the template forms the basis of the further particulars for the vacancy, which are central to the whole recruitment and selection process because they:

- provide the key elements and messages that you include in the job advert;
- identify the key selection criteria (particularly the person specification) that you will use throughout the selection process;
- enable candidates to decide whether they are attracted to the job, are likely to be suitable and ultimately, therefore, whether they wish to apply.

Using the template will help you to provide candidates with a fully comprehensive and easy to follow description of the vacancy. Presentation and content are crucial, as candidates will make assumptions about the role, your department and the University based on the quality and quantity of information provided.

You will need to include the following in the further particulars:

- **job description** - grade and salary range, hours etc. and responsibilities and tasks; this should also include any requirements arising from hazards associated with the role, such as immunisations or on-going health surveillance;
- **person specification** - the qualifications, skills, knowledge and experience that will form the basis of your selection criteria;
- **background information** - on the area of work, the department and the University.

Information on terms and conditions of employment, the benefits of working at the University will be provided with the vacancy details posted on the University web site.
Selection Criteria

The qualifications, skills, knowledge and experience that you include in the person specification form the basis of the selection criteria used throughout the selection process for:

- **self-selection by candidates** - people can make an informed choice as to whether they are suitable;
- **short-listing** - paper-based assessment of how well candidates meet the selection criteria;
- **devising tests, presentations and interview questions** - matching these with specific elements of your selection criteria so you can rate people against them, considering how these might be adjusted to support disabled candidates as appropriate;
- **deciding on the best person for the job** - bringing together the evidence from the selection process to determine who best meets the selection process.

Developing appropriate selection criteria, often referred to as the person specification, is a crucial part of the whole recruitment and selection process. Here are some tips on things to think about in deciding on your selection criteria:

- What is essential to the job from day one and what is desirable (but could be realistically gained through experience, training or further qualifications in the role)?
- Paint a realistic picture of the experience, qualifications and skills you are looking for. Do not set such impossibly high standards that you reduce your chances of finding anyone suitable.
- Don't simply list the attributes of the previous or existing post-holder - consider whether the job evolved or changed since you last recruited?
- Specify the experience you are looking for in relation to:
  - any job-specific processes, equipment or machinery
  - planning and organising skills
  - communication skills
  - flexibility or multi-tasking skills
- Make sure you use statements that are objective, realistic and justifiable and do not inadvertently rule people out who may be suitable.
- Make sure the wording is clear and unambiguous e.g. "a degree or equivalent in a relevant subject" rather than "a degree".
- Specify the nature, quality, context and quantity of each type of experience or skill so that it can be used as an effective measure e.g.:
  - "strong aptitude for computer based work and extensive experience of using a wide range of office PC packages in a deadline-driven environment" rather than "IT skills";
  - "High quality communication skills - able to develop a strong rapport, empathy and professional credibility with senior managers and academics" rather than "good communication skills".
- Do not include age-related criteria in job and person specifications, selection criteria and advert wording. Avoid words like "young", "recently qualified" and "mature", as these could
potentially be seen to be discriminatory to older or younger workers and therefore in breach of the *Equality Act*.

- Avoid specifying a required length of experience. Using such a requirement, particularly where it is for a lengthy period, could potentially be seen to be discriminatory against both younger workers and women who have taken career breaks when having children and therefore in breach of the Equality Act. Focus instead on what type of experience you are looking for, rather than an arbitrary duration, which is unlikely to be a good indicator of performance in any case. Suggested alternatives to length of experience are: "proven" for 1-2 years; "significant" for 3-5 years; and "extensive" for 5+ years. For instance, "Significant experience of providing a service in a busy, customer-focused environment" rather than "Three years customer service experience".

- 'Reality check' your selection criteria to ensure they do not include any content that is potentially discriminatory or unreasonably excludes certain groups without justification.

- Identify at what stage in the process you will be using each of the selection criteria i.e. which can be used for short-listing, interview, tests etc.?

Example selection criteria

A set of [Professional and Administrative Grade Descriptors](#) have been developed in conjunction with Hay (the University's job evaluation scheme) providing typical activities and person specifications for each grade; these can be adapted to the specific requirements of your role.

Other example selection criteria:

- Senior Lecturer/ Lecturer
- Postdoctoral Research Assistant

### 3.4 Agreeing the grade

**Job family and grade**

The University has a [unified grading structure](#). All job roles are allocated a grade through the job evaluation or role profile matching process outlined below. Each job role is also placed in one of the following four job families:

- Research and Teaching
- Professional and Administrative Services
- Technical Services
- Operational Services

The only job roles that are not included in the unified grading structure are the [clinical academic](#) job roles.
Role profile matching for Research and Teaching job roles

Before a job in the Research and Teaching job family can be advertised the recruiting manager will need to have selected the appropriate academic career pathway and role profile so that this information can be entered by the Faculty/Divisional HR Team when the details are submitted through the eRecruit system for advertising.

Job evaluation for other job families

Before a job that will not be in the Research and Teaching job family - broadly, all ‘non-academic’ roles - can be advertised it must have been evaluated through the University of Bristol Job Evaluation Scheme (UBJES). This process will determine the appropriate grade and job family and therefore must be followed for new job roles or existing jobs that have significantly changed.

Clinical academic job roles

The only job roles that are not subject to the UBJES or role profile matching process are Clinical Academic job roles, which are subject to NHS pay scales.

Recruitment and Retention Payments

In order to maintain its position of excellence, the University must be able to recruit and retain high quality staff whose particular expertise may be in short supply; the Recruitment and Retention Payment policy provides a mechanism to address such market conditions, whilst maintaining the link between pay and job evaluation, through a separately identified addition to the salary range for a role.

3.5 Who to involve

The selection process should be carefully planned and a key element will be to decide on the most appropriate selection methods to use for your vacancy.

One early decision you will need to make is whom to include on your selection panel and who will chair the panel. This should be a small but representative group of relevant stakeholders who know the job and its requirements well. This would certainly include the line manager and, in many cases, a representative from outside the immediate work area; this is particularly important for non-academic roles, where a colleague from a School or Division that the post-holder will be providing a service to or working in partnership with would be appropriate. The panel will normally include at least three people, with two the absolute minimum, with a gender balance wherever possible.

There are more specific requirements for selection panels for the following appointments:

- Lecturer, Senior Lecturer/Reader (Academic Career Pathway One) and their clinical equivalents
- Chair and their clinical equivalents
For all other appointments, the panel should be a small but representative group of relevant stakeholders who know the job and its requirements well. This would certainly include the line manager and, in many cases, a representative from outside the immediate work area, particularly for roles where a colleague from a School or Division that the post-holder will be providing a service to or working in partnership with can be identified (e.g. a Dean, Head of School or Faculty Manager on the panel for a Faculty Financial Controller or HR Manager) and vice versa.

The panel will normally include at least three people, with two the absolute minimum.

The normal expectation is that a reasonable gender balance will be achieved in the composition of the panel.

All selection panel members should have been on the University’s Successful Recruitment and Selection training course or an agreed appropriate alternative. Exceptionally, where an individual other than the Chair is identified as a key panel member and is not able to attend the course or other suitable training in time for the selection process, they may take part subject to the Chair taking responsibility for ensuring that they are briefed and competent to play an active and effective role.

If a member of the panel has a family or non-work related social connection with any of the candidates invited for interview, they should declare this to the Chair of the selection panel at the earliest opportunity before the interviews take place. The Chair will then need to make a judgment as to whether the individual should remain part of the process or be replaced. Normal academic or professional contact, which may involve a degree of social contact, would not normally be a reason for excluding someone from the process.

3.6 Timescales and costs

When planning the recruitment and selection process it is important to establish realistic timescales for the different stages. There is often a temptation or pressure to complete the process in the shortest possible time to that you can have the new person in place. This can be counter-productive if timescales are too tight or unrealistic. If the vacancy is being placed in any external media then the relevant advertising deadlines will be a constraint that you will have to work with. Other issues to think about are availability of your panel members, whether any holiday periods fall within your proposed timescale and whether there are any preferred times for the new recruit to commence employment.

As a general rule of thumb think of the following as a guide to minimum timescales for the different stages, although it is worth building in extra time where you can to cover for slippage. Timescales will often be longer for recruitment to Academic (Lecturer, Senior Lecturer/Reader, Chair and their clinical equivalents) or Senior Professional & Administrative (grades J-M) vacancies.
You may have to be flexible or to make changes to the dates or times of interviews to avoid unlawful discrimination, particularly indirect discrimination if you cannot objectively justify what you are doing, or a failure to make reasonable adjustments.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Timescale</th>
</tr>
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<tbody>
<tr>
<td>Planning and preparation (including authorisation, and writing job description/ job evaluation to confirm the grade where required)</td>
<td>2-4 weeks</td>
</tr>
<tr>
<td>HR to process the vacancy details, post on the web and place in external media (subject to the relevant advertising deadlines)</td>
<td>2-5 days</td>
</tr>
<tr>
<td>Time that vacancy is live for applications (until the formal closing date)</td>
<td>2-3 weeks (or 28 days minimum requirement where there is the prospect or likelihood of appointing an overseas candidate who requires a work visa)</td>
</tr>
<tr>
<td>Short-listing</td>
<td>1 week</td>
</tr>
<tr>
<td>Notice given to short-listed candidates of interview/ selection process</td>
<td>2 weeks</td>
</tr>
<tr>
<td>Issue of formal offer and contract of employment</td>
<td>1 week</td>
</tr>
<tr>
<td>Notice period your selected candidate is required to give</td>
<td>Normally 1-3 months if in current employment</td>
</tr>
</tbody>
</table>

**General recruitment costs**

HR centrally fund advertising costs in the majority of cases and also pay reasonable interview and relocation expenses. Therefore the main departmental outlay is in management and administrative time, with some small potential costs relating to room bookings, refreshments etc.

**Externally-funded (research) recruitment costs**

In some cases, research grants will cover costs relating to the recruitment of research staff. When submitting a grant proposal you may be required to provide an estimated figure for recruitment costs. [Click here to download a document detailing estimated costs for a research vacancy.](#)

**4. Advertising**

**4.1 Planning how to advertise your vacancy**
Redeployment

All vacancies are initially open to staff in the University Redeployment Pool (URP) only before being advertised more widely. The redeployment stage is managed by HR Faculty/Divisional HR Teams.

Internal only advertising

In line with existing Trades Union agreements the following vacancies are advertised internally only first before any external advertising:

- Professional and Administrative Grades F-H
- Technical Grades F and above

An 'internal' candidate is defined as a member of University of Bristol staff who has some form of employment with the University (whether a permanent, fixed term, casual or honorary contract, a fees paid basis or via the temporary staffing service).

If there are no applications or no suitable candidate is selected, the Faculty/ Division HR Team will liaise with the line manager to advertise the vacancy externally as below.

External advertising

For all vacancies except those restricted to internal only advertising as above it is generally University policy to advertise widely to ensure the strongest possible field of candidates, that there is fair and open competition and to enable the University to benefit from a diverse workforce. As a minimum this means placing the vacancy on the University of Bristol job vacancies web site; HR also automatically promote vacancies through the Jobs.ac.uk web site, the Jobcentre network, universal jobmatch. The University also promotes vacancies through a range of web sites as part of an on-going centrally funded online campaign. The value of using any further additional media to increase your pool of candidates and target the right sort of people for your job should be carefully thought through. You may well be aware of the best media for targeting candidates in your field; where necessary we can also seek advice from our recruitment advertising agency or analyse our own data or external research data, such as the 2013 survey of University recruitment effectiveness. Generally web sites and on line job boards will be the most effective way to advertise your job, print media is now less commonly used for recruitment advertising and job seeking. If you wish to discuss media choices, your Faculty/ Division HR Team will be happy to advise during the planning stage.

The central recruitment budget held by HR may, where appropriate and agreed with the Resourcing Manager, fund all or part of the cost of any additional media used.

Best practice is that vacancies should be open for at least 2-3 weeks to give potential applicants time to apply and to help ensure a good field of candidates; one week is the absolute minimum period to advertise. There is a legal duty for any vacancy to which the University wishes to appoint a migrant worker to have been advertised for at least 28 days in order to meet the Resident Labour Market Test of the points based immigration system.
The Government has set up a number of welfare to work initiatives aimed at matching motivated and skilled people who are currently not in employment to employers and jobs. Tapping into this resource can potentially be an effective (and no-cost) way of finding suitable candidates.

**Networking, social media and informal contacts**

Remember to also promote your vacancy through any professional, subject-related or work-based networks that you or colleagues are members of - whether through social media such as LinkedIn, Twitter or Facebook; subject or profession related blogs, web sites, newsletters and e-mail alerts; or the more traditional face-to-face contact at meetings and conferences etc. Informal and word of mouth promotion to targeted groups is an effective and no-cost way of widening your pool of suitable candidates.

**Using recruitment agencies and consultants**

The University’s general policy is to advertise vacancies rather than use agencies or consultants. This is because the University has its own established, professional and efficient infrastructure for recruitment and to ensure the strongest possible field of candidates, fair and open competition and that costs are minimised.

In exceptional circumstances it may sometimes be appropriate to use an agency or consultant, for instance where the vacancy is highly specialised and it is reasonably anticipated that it will be hard to find a suitable candidate through advertising. This option should only be followed after consultation with the University’s Resourcing Manager and will generally be in tandem with the vacancy being advertised on the University’s web site. How the agency or consultant fee will be paid for will need to be decided on a case-by-case basis.

**Exceptions to the requirement to advertise**

It is only generally in the following circumstances that a vacancy would not need to be submitted to Human Resources for advertising:

- Where there are staff in the recruiting department/school or faculty/division who are formally at risk of redundancy and seeking redeployment;
- If the vacancy has come about as part of a restructuring exercise, in which case the selection process would normally be restricted to people within the department;
- Where there is a named person on a research grant, selected for objective and justifiable reasons, the person can be appointed to a research vacancy without advertising;
- Where an exceptional talent process or direct appointment has been approved.

**4.2 Writing your advert**
You will need to draft a concise but informative job advert. Key points to consider when doing this include:

- Capture the main elements and attractions of the job and the type of person you are looking for in a punchy and appealing way. Try to do this in 50-100 words based on the information you have already compiled in the further particulars.
- Keep words, sentences and paragraphs short and clear.
- Make sure the job title will be meaningful outside the University.
- Try to envisage the skills, knowledge and experience you would wish to encapsulate? What would they already know about the University and the job? What do they need to know?
- Emphasise the most interesting elements of the role and don't labour the obvious.
- Ensure that you do not use any potentially discriminatory language, terms or criteria.

Most people will see your vacancy details on the web and the University's recruitment advertising agency, TMP, have put together some helpful advice for you. Click the following link to download the document: Useful hints and tips for writing advert copy for the web.

4.3 Submitting your vacancy for advertising

Vacancies are published on the University web site and in other media by HR. To make this happen, you will need to contact your Faculty or Divisional HR Team and provide details of the vacancy, including a draft advert, further particulars and an idea of where you wish to advertise.

Your Faculty or Divisional HR Team will then advertise your vacancy via the online recruitment system, eRecruit. All vacancies are initially subject to an on-line check against the University Redeployment Pool. If there are no potential matching redeployees, and unless there is a need to clarify any information with you or a funding query arises, your vacancy will normally appear on the web site within a few days.

4.4 The application process

The vacancy will appear on the University's web site, from which people can download the job description, access other information on working at the University and apply online. All adverts appearing in external media will direct people to the web site.

The University's application forms and vacancy details are also available in a range of alternative formats (e.g. Braille, large print, audio CD or tape or e-text) for candidates who are disabled.

All applications can be accessed by the specified departmental contacts for the vacancy on receipt, through eRecruit.
Diversity monitoring information on age, gender, nationality, ethnic origin and disability is transferred to the HR database (PIMS) and not made available to the recruiting department.

In line with the Asylum and Immigration Act 2006 the University has a legal responsibility to ensure that all employees are entitled to live and work in the UK. The application form requires applicants to confirm whether they currently have permission to work in the UK.

For academic and research vacancies or those that require highly specialist skills and qualifications, the University may be able to provide a certificate of sponsorship for a suitably qualified applicant to help in obtaining permission to work in the UK from the UK Border Agency. However, for other vacancies it may well be unlikely that permission to work in the UK would be granted. In such cases, how to consider an overseas national who does not currently have permission to work in the UK is outlined in the guidance on short-listing.

All vacancies close for applications at midnight on the closing date. The day after the closing date the contact for the vacancy will receive an e-mail from the Faculty/Divisional HR Team with a link to view the applications and instructions on taking forward the short-listing process.

4.5 Re-advertising a vacancy

If a vacancy has been advertised internally only and there are no applications or no suitable candidate is selected, your Faculty/Divisional HR Team will liaise with you to advertise the vacancy externally.

If a vacancy has been advertised externally and you have not been able to fill it, it is sensible to take stock before automatically re-advertising using the same job details. There are a number of questions that you need to consider before proceeding:

- You may want to review the need for the vacancy to be filled – could the workload be effectively and fairly absorbed by existing staff?
- Was there anything about the job that may have led to it remaining unfilled – are the duties appropriate and well defined, is the grading right, does the job title accurately describe the job?
- Did the advert and further particulars give an accurate and attractive picture of the job?
- Was the job advertised in the right media for the target group you are trying to attract?

You may wish to discuss the situation with your Faculty/Division HR Team for advice on how to proceed. In some cases it may be appropriate to pursue other methods of filling the vacancy, for instance through a recruitment agency.

If you do decide to re-advertise the vacancy, your Faculty/Division HR Team will liaise with you to make any amendments as necessary and then re-advertise the vacancy through eRecruit.
5. Selection

5.1 Deciding on selection methods

A well-planned and structured interview process is an adequate way of helping you to select the most appropriate candidate. However, it is more effective if used alongside other selection methods that can help give you a more rounded picture.

Whichever selection methods are used, it is important to ensure that:

- The methods chosen are appropriate to the job and will provide added value in assessing the best candidate. For example, it would not be appropriate or useful to ask candidates for a more junior clerical role to give a presentation.
- The panel are clear as to how the method used relates back to the selection criteria and how performance will be assessed;
- The selection process is clearly defined to all the candidates in advance and consistently applied to all;

Remember that using a range of selection methods will increase the level of forward-planning involved and will often require someone from outside of the selection panel to co-ordinate the exercises during the day.

5.2 Redeployment stage

Before all vacancies are advertised more widely your Faculty/Divisional HR Team will carry out an on-line check of your job against the profiles of staff in the University Redeployment Pool. If there are any candidates who are a potential match they will be given 5 working days to confirm their interest through submission of a personal statement.
If confirmation of interest is received you will be informed by your Faculty/ Divisional HR Team. A selection process will then need to be carried out in line with the University's Redeployment Policy before the vacancy can be advertised more widely.

If there is no candidate match (or none of the potential matching candidates express an interest in the role) your vacancy will be advertised immediately in line with our advertising policy.

5.3 Shortlisting

You will receive an e-mail from your Faculty/ Divisional HR Team the morning after the closing date for your vacancy, which will refer you to the actions required to carry out the short-listing process (Note - the system will accept applications up till midnight on the closing date). The e-mail will include a link to a single PDF document containing all the applications for your vacancy.

Short-listing is the vital first stage in the selection process. Measuring how candidates match up to your selection criteria at this stage is crucial to enable you to objectively assess which of the candidates you wish to consider further in the next part of the selection process, generally the interview stage. This is particularly the case where you have a large number of applicants, in which case you may wish to split the process into a long-list and a short-list stage. (If no suitable applications are received, you may wish to re-advertise the vacancy.)

Ideally, everyone who is part of the selection panel should be involved in the short-listing process either together or independently. However, if this is not practicable, at least two of the panel should be involved.

Tips for the short-listing process

Here are some tips to help you use your selection criteria effectively and fairly in the short-listing process:

- Decide which of the selection criteria included in the further particulars you can practically use when reviewing the written applications. You may decide to focus on the essential criteria initially.
- It is useful to give each criterion a value and weighted according to their importance, then you can score each candidate against each criterion and come up with an objective rank order. A simple matrix can be useful for recording this process.
- If you use a criterion based on how well each candidate has completed their application make sure the assessment is not based on arbitrary factors such as standard of hand-writing.
- Base your assessment on the evidence that the candidate has provided and try not to make assumptions to 'fill in the gaps' - if they haven't demonstrated that they have a particular skill or experience then don't assume they have.
- If you have a large number of applicants who appear to meet the essential criteria then use your desirable criteria to try to identify those who are most suitable. You may wish to initially
draw up a 'long-list' of those who meet the essential criteria first and then identify those to call for interview from this group.

- Overseas nationals who have recorded in their application form that they would require permission to work in the UK to take up the job should be considered alongside the other applicants in the first instance. It’s also important to remember that the resident population of the United Kingdom contains a range of ethnic and national groups and there are also a wide range of people from outside the UK who are eligible to work here. If there are sufficient applicants who are both currently entitled to work in the UK and meet the criteria for the vacancy, it may be appropriate not to shortlist an overseas national who does not currently have permission to work in the UK in the form of an appropriate visa for the role. In most cases it will only be academic and research vacancies, or those that require specialist skills and qualifications in ‘shortage’ areas, for which the University would be able to obtain a certificate of sponsorship for a migrant worker who needs a work visa. If you have short-listed overseas nationals for a non-academic role then you are advised to check their eligibility to work status with your Faculty/ Divisional HR Team.

- If you have candidates with qualifications from outside the UK, the UK NARIC website contains comprehensive information on how international qualifications compare with their UK equivalents. The University only has limited user access to the site, so if you need to check a qualification equivalence please e-mail richard.boyce@bristol.ac.uk with the details.

- Ideally you should be looking to short-list no more than about seven candidates (four to six is probably the optimum number).

- Identify reserve candidates in case people drop out.

- Ensure that you can objectively justify the cut-off point between those you short-list and those you do not.

- The Chair-person of your selection panel should be the final arbiter if there is disagreement on who to short-list.

The eRecruit system then needs be used to formally record the short-listing outcomes and trigger your Faculty/ Divisional HR Team to liaise with you in setting up the interviews/ selection process. Please follow the eRecruit guidance on this part of the process. Following this guidance will also ensure that unsuccessful candidates are notified by an email from the eRecruit system.

And remember, individuals can potentially appeal against a decision not to be short-listed so make sure your decisions are fair, objective and non-discriminatory, and properly recorded.

You may have heard about some employers using social networking sites to ‘check’ candidates out before proceeding to shortlist or offer employment. You are strongly advised not to enter into this practice: social networking sites often contain highly personal information which, taken out of context, should form no part in the selection process for employment; not least because this practice may lead to allegations of discrimination, as such sites will often identify the person’s age, sexual orientation, marital status etc.
5.4 Setting up and preparing for the interview/selection process

The process for setting up and preparing for an interview for a Lecturer, Senior Lecturer/Reader, Chair or their clinical equivalents has some variations to the guidance outlined below.

The first key element of a well-structured and successful interview process is preparation. Remember that it is not just the candidates who are being selected - it’s important that you make a good impression too. A professional and well-organised selection process can go a long way towards ensuring this.

Panel Preparation

Preparing for the interview should include the following:

- Deciding on who should be included on the selection panel.
- Deciding on the areas of questioning based on your selection criteria and how best to word your questions to elicit the most useful information from the candidate.
- Ensuring all members of the panel are familiar with, and have copies of, the applications of those being interviewed and the job description/person specification in advance. It is also worth ensuring that you are familiar in general terms with the relevant terms and conditions of employment and employee benefits.
- Developing an interview plan and ensuring that all members of the panel are familiar and comfortable with their role. This should be structured to include introductions and preliminaries, the questions to be asked, running order and who is asking what.
- Identifying how the selection criteria are to be scored and weighted when assessing each candidate, and ensuring that each panel member has a Candidate Interview Assessment form annotated with the scores and weightings for each criterion.

Interview logistics

Panel members will receive an e-mail from your Faculty or Divisional HR Team, which will provide full details of the interview and selection process. The e-mail will include a link to a single PDF document containing the applications for the interview candidates and links to the interview forms.

Your Faculty or Divisional HR Team will work closely with you on the process and co-ordinate the following:

- Developing an interview schedule with realistic timings including a 5-10 minute break between each candidate. This should also include any other selection methods that will be taking place;
- Inviting the candidates by e-mail, confirming full details of what the selection process will involve.
- Paying reasonable interview expenses incurred by the candidates are paid from the central HR budget. A copy of the University's interview expenses policy and the interview expenses form should be included with the invitation. The expenses policy also includes links to local
hotels that the University has contracts for preferential rates with, which can be booked on the University account where necessary.

- Chasing confirmation of attendance;
- Taking up references for all candidates whom you invite for interview (for Research and Teaching vacancies only) and sending copies to the panel;

You will need to liaise with your Faculty or Divisional HR Team to identify who will take responsibility for organising the following ‘local’ logistics:

- identifying selection panel members, establishing availability and finalising a date;
- booking a suitable venue and ensuring it is set up properly on the day;
- booking any refreshments and equipment;
- devising tests and presentation titles;
- ‘Meeting and greeting’ the candidates on the day.

If you request assistance from your Faculty or Divisional HR Team with some or all of this activity, for instance if there is no suitable venue locally or if you have no admin/secretarial support available, then it will be provided wherever operationally possible. The Faculty/Division HR Team may also be more involved if a more complex assessment centre process has been adopted or if psychometric tests are to be used.

**The interview setting**

This is mostly common sense but easy to overlook nevertheless. When choosing a venue and setting the room up:

- Try to eliminate distractions - ensure any telephones are diverted, avoid busy places with lots of people walking by or talking within earshot;
- Place an "interviews in progress" sign on the door;
- Think about whether you want to avoid physical barriers such as a desk between you and the interviewee to encourage a more relaxed discussion. If you are more comfortable with a table to rest on, even having a round rather than a square table can help to do this.

**Issues that may arise at the preparation for interview stage**

- If a candidate is being invited from abroad, attending the interview will usually incur significant travel and accommodation costs (such costs are met from the central recruitment budget held by HR). As an alternative a video-conference or other virtual link for the interview may be feasible.
- If someone you invite for interview can’t make the date or time set, although you are not necessarily obliged to re-arrange their time or date, it is recommended that you at you at least consider whether you can accommodate their needs. If the candidate is unable to attend due to child-care responsibilities, a disability issue or even a religious holiday then you may be potentially discriminating if you do not take this into account. If the reason is a holiday or other commitment, then you will need to make a pragmatic decision as to whether re-arranging is feasible.
• A candidate may raise a health or disability issue in their application or during the selection process.

• If a member of the panel has a family or non-work related social connection with any of the candidates invited for interview, they should declare this to the Chair of the selection panel at the earliest opportunity before the interviews take place. The Chair will then need to make a judgment as to whether the individual should remain part of the process or be replaced. Normal academic or professional contact, which may involve a degree of social contact, would not normally be a reason for excluding someone from the process.

5.5 Interview technique - the structured interview

An interview is only an effective indicator of who is the best candidate if it is well structured. Following the advice outlined below will enable you to structure and carry out your interviews effectively.

**Aim for:** A constructive conversation that leaves the candidate feeling they have been able to perform at their best and gives you the information you need.

**Not:** An over-formalised 'grilling' that leaves the candidate feeling that they didn't get their points across and leaves you with an incomplete picture of the candidate's suitability.

The first key element of a well-structured and successful interview process is preparation.

You should also give thought to:

- Opening the interview
- Asking the right questions (and avoiding the wrong ones!)
- Active listening
- Taking notes
- Closing the interview

**Opening the interview**

Opening the interview in a clear, relaxed and open way is important for a number of reasons:

- It gives candidates information about what to expect;
- It helps nervous candidates to settle down and relax;
- It gives you a chance to start building a rapport with the candidate;
- It provides a professional image of you and the organisation;
- It sets the tone for the rest of the interview and encourages the candidate to talk openly about themselves.

A good way to do this is to start with the following:

- Welcome the candidate, thank them for coming, show them to their seat etc.;
- Ask a straight-forward question whilst they settle in to help put them at ease, e.g. ‘how was your journey’?
- Introductions from yourself and other panel members - keep this brief;
- Outline how the interview will progress. Explain approximate length, who will be asking questions, that there will be opportunity for the candidate to ask any questions they have at the end, and that the panel will be taking notes during the interview.
- You may wish to provide a brief description of the job at this stage to set the scene, perhaps particularly for more senior roles. Alternatively, you can check whether the candidate understands the role when they have the opportunity to ask questions at the end.
- If there are any issues surrounding the job that are particularly important or that you anticipate may not be fully clear then it is worth spending some brief time covering these points. Examples could be:
  - clarifying that a job is on a fixed term contract or that although it is on a 'permanent' contract it is subject to fixed term funding;
  - clarifying hours for a part-time job and discussing any flexibility or constraints in work patterns.

Asking the right questions

Having prepared your interview plan you will have a set of standard questions. This is the framework to ensure that you cover the same ground with all the candidates and can objectively assess the information they provide against the selection criteria.

However, you do not want either a stilted exchange or to come out of the interview with missing information. So also remember to:

- Probe with follow-up questions - see the active listening section below;
- Link the previous answer and your next questions together so that the conversation flows;
- Pick up on aspects from individual applications that are unclear e.g. an unexplained break in employment, clarification of a qualification etc.;
- Check with other panel members whether there are any final follow-up questions at the end of the planned areas of questioning.

<table>
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<th>Types of questions</th>
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<td>Most useful questions</td>
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OPEN
- Examples: What experience do you have that you feel is most relevant to this job?
- How do you prioritise your workload?
- What? How? Why? Questions that provide the candidate with an opportunity to talk and open up on a particular subject.

BEHAVIOURAL
- Examples: Can you give an example of when you've had to solve a problem using your own initiative? What did you do in your last job to ensure that you met any deadlines you were set?
- Research has shown that past behaviour is often the best indicator of future performance. Asking behavioural questions enables you to obtain evidence of how the candidate is likely to carry out a task or exhibit a skill in the future.

PROBING
- Example: That's interesting, can you tell us more about what you did?
- You may need to follow up your initial set question if you wish to pursue a particular point further to obtain fuller information.

Use with caution

CLOSED
- Example: Did you have to deal with difficult customers in your last job?
- Such questions can lead to one-word answers that can be useful if you are looking to clarify specific points but otherwise may have to be followed up.

HYPOTHETICAL
- Example: How would you go about training a new colleague in.....?
- May help to gauge the candidate's speed of thought or capacity to provide solutions. However, if used as a key question for one of your criteria, there is a danger that the candidate will give you the answer they think you want to hear, rather than an indication of how they would actually behave or perform.

Best avoided

LEADING
- Example: Presumably you work well as part of a small team?
- The expected response is generally obvious so you will get the answer you want but without actually finding out anything useful.

DOUBLE-HEADED
- Example: What experience do you have in a customer-focused role and what skills do you think lead to good customer service?
- Two questions in one - uncouple them and present as two different questions to ensure you get an answer to both.
MULTIPLE CHOICE

- Example: Did you leave your last job because of the unsocial hours or were you looking for a new challenge?
- Neither of the possible answers, which are probably based on assumptions rather than facts, may actually provide the real reason.

Always avoid

DISCRIMINATORY - general

- Example: How do you think you will cope as part of a younger team?
- Any questioning along these lines that implies the person would be disadvantaged because of their circumstances, e.g. gender, ethnic origin, age etc. should not be pursued.
- Example: Do you plan on having a family in the future?

You must not refuse to employ a woman because she is pregnant, on maternity leave or because she has (or has had) an illness related to her pregnancy. Equality law does not say that a woman applying for a job with you has to tell you that she is pregnant, nor must you withdraw a job offer if you discover that she is pregnant.

DISCRIMINATORY - relating to disability

- The content of an interview should be the same for a disabled candidate as for the other candidates, focusing on their ability to do the job and not on their disability.
- Avoid any questions relating to levels of sickness absence in previous employment.

You may wish to refer to our comprehensive bank of open, behavioural and probing questions covering a wide range of common areas of skills and experience. Remember to tailor these 'off the shelf' questions to your needs and ensure that they relate back to your selection criteria.

Active listening

Listening effectively is just as important as asking the right questions. And showing that you are listening will encourage the candidate to be more open and relaxed.

Here are some general points to help you do this effectively:

Non-verbal prompts - Head nodding, smiling, maintaining eye contact without staring and other appropriate body language can all show that you are listening and help the conversation to flow.
Silence is ok - Allow the candidate a few seconds to think about and then answer your question. If they have not understood or cannot answer the question they will generally let you know, so resist the temptation to jump straight in if the answer is not immediate.

Keep an open mind - Listen to the whole answer and avoid making assumptions based on the initial reply. Probe and follow-up where your question has not been fully answered.

Probe and follow-up - Verbal prompts can encourage the interviewee to continue talking if they have not fully answered your question e.g. "Go on", "Tell us more about x", "What do mean by y" etc.

Think ahead and link questions - Although you will have a list of questions in an order, the candidate may well answer or begin to answer one of your later questions at an earlier stage. If this happens don't be afraid to re-jig your order (although you need to avoid confusing fellow panellists!) or, alternatively, proceed but remember to link back to what they said when you come to the question.

Confirm your understanding - If you need to check that you have correctly understood an important point, paraphrase or restate what you have heard so the candidate can confirm or elaborate where necessary.

Guide the flow of the conversation - If the discussion is drifting away from your areas of questioning, bring it back on track using probing and follow-up questions or by summarising. But try and avoid interrupting or talking over the candidate.

Taking notes

Taking notes whilst listening can be a tricky skill (if you share the load of note-taking with fellow panel-members this can make life easier) but is a good idea for a number of reasons:

- It shows the candidate that they are being listened to and taken seriously (but let them know from the outset that you will be taking notes).
- Your notes will be invaluable at the end of each interview and especially at the end of the day when it can be hard to remember who said what. Such an 'aide-memoire' can help avoid subjectivity or inaccuracies creeping into your decision-making.
- In the event that you have to provide feedback to unsuccessful candidates or even to defend a decision, your notes can similarly be an invaluable source of evidence to help you do this accurately. But remember to ensure they are factual and objective, as the Data Protection Act covers any written records and a candidate could request to see a copy.
- You may find it helpful to draw up a simple 'pro-forma' beforehand to assist you with taking notes during the interview. For instance, a typed-up copy of the set questions with enough space in between each to record responses.

Closing the interview

The closing section of the interview should have three elements:
• The opportunity for the candidate to ask any questions they may have - remember the interview is a two-way process.
• You may also at this stage want to ask if the candidate has any questions on terms and conditions of employment and employee benefits. This is an opportunity to then promote and confirm this information, which can often be an important factor in people’s decision-making process.
• An explanation of what will happen next and an indication of timescale. Don’t commit to something that you won’t be able to achieve for all candidates e.g. "we will ring you tomorrow".
• Thank the candidate for attending.

5.6 About the interview forms

There are some straightforward forms that need to be completed in order to provide a full record of the process. The chair of the panel (or a colleague working on their behalf who has been given eRecruit access to the vacancy) will also need to record the outcomes for the candidates who have been interviewed in eRecruit in order to progress the appointment of your chosen candidate.

The forms should be returned, along with any other notes and documentation relating to the selection process, to your Faculty or Divisional HR Team (or the Resourcing Team for Chair posts) at the end of the process.

Candidate Interview Assessment form
• Each panel member must complete one form each.
• The form includes a brief summary and a score for each candidate, to be completed at the end of each individual interview.
• Together with the more detailed notes you will have taken during each interview, the forms can be used to help you in your discussion with the other panel members on the merits of each candidate.
• Importantly, this form enables you to provide accurate feedback to unsuccessful candidates or even to defend a decision should you be challenged. Again, remember to ensure your feedback is factual and objective, as the Data Protection Act covers any written records and a candidate could request to see a copy.

Interview Panel Report and Authorisation of Appointment
• This form is completed by the Chair of the interview panel.
• It provides a summary record of the discussion and final decision on the best candidate, based on the interview and any other selection methods used.
• It is useful for the purposes of feedback and defending your decision as above.
5.7 Other selection methods

A well-planned and structured interview process is an effective way of helping you to select the most appropriate candidate. However, it is most effective if used alongside other selection methods that can help give you a more rounded picture.

Effectiveness of different selection methods

Research into the value of different selection methods has indicated wide variations in accuracy and effectiveness at indicated below:

<table>
<thead>
<tr>
<th>More effective</th>
<th>Less effective</th>
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<tbody>
<tr>
<td>Assessment Centres 68%</td>
<td>Bio-data analysis 38%</td>
</tr>
<tr>
<td>Structured interviews 63%</td>
<td>Personality tests 38%</td>
</tr>
<tr>
<td>Work-related tests 55%</td>
<td>Unstructured interviews 15%</td>
</tr>
<tr>
<td>Ability tests 54%</td>
<td>References 12%</td>
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Some of the methods most commonly used alongside the structured interview are outlined below.

Work-based tests

For jobs that are focused on well-defined processes and tasks, work-based tests can be a useful indicator of how candidates would actually perform. Examples of work-based tests include:

- 'In-tray' exercises for clerical and administrative roles - e.g. how and why they would prioritise a list of tasks; writing a reply to a letter, data-input exercise etc.;
- Practical tests for technical or manual roles - e.g. carrying out a simple experiment or other lab based routine.

Such tests are by definition best devised locally, so that they are clearly focused on the particular requirements of the role. An example of a test used for vacancies in HR may provide some help in doing this. The University's Manager can provide further advice and guidance to help you implement tests.

Sub-panel interviews

It can often be useful, particularly where there are larger numbers of potential panel members than can comfortably be involved in a formal interview, to form a number of smaller (usually two-person) panels to undertake short, focused discussions with each short-listed candidate on targeted areas of the role/person specification.
Holding one or more focused discussions with candidates on specific key areas of the person specification can enable greater scope for probing than is offered in a traditional interview setting, and therefore provides an opportunity to build an enhanced picture of the candidates’ skills/knowledge/experience in particular areas. Other benefits include a more personal and relaxed forum for discussion for both parties, and greater flexibility in diarising meetings.

**Presentations**

It is a requirement of the selection process for Pathway 1 and Pathway 3 roles that candidates be invited to deliver a presentation on a relevant research or academic topic (in the style of an undergraduate or postgraduate lecture) to an audience of academic staff and students from the department/faculty and other invited participants depending on the focus of the talk.

A presentation can also be a useful element of the selection process for other jobs, particularly professional or managerial roles. The presentation can be just to the panel or to a wider group, although if the group is wider you need to ensure that the audience understands what sort of feedback they should give and how this will be reported.

**Work samples**

Some job roles lend themselves to examples of work that can usefully be used as indicators of suitability, for instance published academic work or portfolios of creative output. In such cases applicants could be asked to provide samples of recent work either at the application stage or, where this may well produce large volumes of work to be assessed, as part of the interview stage.

**Visits and meetings with the team**

The addition of a more informal element to the selection process can often be useful to gain a broader view of a candidate’s suitability and also to provide them with a clearer picture of the working environment they will be coming into. For example, alongside the more formal interview the candidates could meet with colleagues they would be working with in the team or department. This can also be a chance for colleagues to provide information or answer questions on terms and conditions of employment and employee benefits. If feedback from the informal elements of the process is to be used as part of the overall assessment then it is particularly important to inform the candidates in advance.

**Telephone or video-conference interviews**

Telephone interviews can be used as an additional selection tool. They can, for instance, help identify which candidates to short-list from a long-list or even to assess the telephone skills of candidates if appropriate.

Sometimes there may be logistical problems associated with an overseas candidate attending a face-to-face interview. This may simply be that a prohibitively long journey is involved, or not possible or that the cost of the journey is particularly high (the costs are met from the central recruitment budget held by Human Resources). Telephone interviews are not recommended in this situation unless as a last resort. In such cases a video-conference link is the best alternative option (again, the cost would be met from the central budget). The University has a number of video-conference
facilities, arrangements for which can be made through Telephone Services by e-mailing kevin.thomas@bristol.ac.uk; alternatively, a remote interview could also be set up through Skype, if both parties have the software and a webcam.

The principles outlined for face-to-face structured interviews should be applied as much as possible to telephone and video-conference interviews. The potential pitfalls relating to discriminatory practice or making wrong decisions are magnified even further in a remote interview. This method should therefore be used with caution.

**Psychometric tests**

Psychometric tests are designed to provide a profile of an individual's intellect, ability and behavioural patterns and can help to provide a more informed judgment of their suitability for the role. However, they are sophisticated assessment tools that should only be set up, administered and assessed by a trained individual. Any decision to use psychometric tests should only be made in consultation with the University's Resourcing Manager.

**Assessment centres**

Assessment centres are structured events that include a range of the above selection methods and group activities. They typically take place over one or two whole days. If you wished to explore the possibility of setting up an assessment centre event then this should be discussed with the University's Resourcing Manager first.

**Choosing the most appropriate selection methods**

If you choose to use any of the above selection methods it is important that:

- The method chosen is appropriate to the job and will provide added value in assessing the best candidate. For example it would not be appropriate or useful to ask candidates for a more junior clerical role to give a presentation;
- The panel are clear as to how the method used relates back to the selection criteria and how performance will be assessed;
- The selection process is clearly defined to all the candidates in advance and consistently applied to all;

Remember that using other selection methods will increase the level of forward-planning involved and will often require someone from outside of the selection panel to co-ordinate the exercises during the day. Reasonable adjustments may also need to be considered to support disabled candidates.

**5.8 Deciding on the best candidate**

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Making your decision

At the end of the interview process the panel will need to discuss who is the best candidate and whether they are appointable. It is worth structuring this stage properly to help you make an objective and sound decision:

- Each panel member should initially take some time to refer to their notes, including the scores and summary comments on the Candidate Interview Assessment form. Independently, each panel member should then rank the candidates in order;
- The panel should then come together and discuss how each candidate performed in relation to the selection criteria. You may want to look first at whether there are any candidates who are clearly not appointable or less suitable than others, although make sure you have a full discussion before deciding on this.
- If you have used other selection methods alongside the interview such as tests or presentations, make sure that performance assessments of each candidate also inform your final decision.
- If any University staff formally at risk of redundancy (as indicated by a covering letter from the Resourcing Manager) have been interviewed, then they should be considered in accordance with the University's Redeployment of Staff policy.
- A panel operates best if it works as a team to come to an agreed decision. The Chair’s role is to ensure that there is a full discussion, that all have their say and that any differences of opinion are debated. Ultimately the Chair will make the final decision if there is unresolved disagreement on whom to appoint.
- When you assess a disabled applicant’s suitability for the job you must take account of how reasonable adjustments could enable them to do the job. If, after taking reasonable adjustments into account, they would not be the best person for the job, you do not have to offer it to them. Always contact Human Resources for advice where you are considering a candidate with a disability.
- Sometimes if there is a large amount of discussion or the interview day has been long, you may feel that it’s best to take some time out and reconvene the next day.
- If there is still uncertainty over the first-choice candidate, or if you are finding it hard to decide between two or more candidates, it is often a good idea to call them back in for a more focussed follow-up discussion so that you can come to a more final and fully informed decision. This should involve at least two representatives from the original panel and should be arranged as soon as is possible.
- It’s often the case that although there is a first-choice candidate, there are also others who would be appointable. Make sure that you establish who falls into this category and in what order so that you can move quickly if your first-choice candidate does not accept the job offer. A further discussion with the rest of the panel before making any further offer is normally sensible.
- Finally, if the panel has significant doubts about the ability of any of the candidates to fulfil the role effectively - don’t appoint. It may not seem like it at the time but it far better in the long run to go through a second recruitment process and find the right person than to appoint the wrong person and have to deal with the consequences.
• if you are unable to make an appointment for whatever reason, you may wish to re-advertise the vacancy.

Avoiding bias

Panel members are only human and decision-making is not a mechanical process but based on judgment; therefore we are all potentially susceptible to unconscious bias, distortion or stereotyping. The risk is that this could lead to decision-making that is potentially discriminatory. Here are some things to remember to help you avoid this and ensure your decision is an informed one:

• **The primacy effect** - If you are interviewing several candidates then the most recent will be clearer in your memory than those seen earlier in the day. This may magnify the good or bad points of the most recently seen at the expense (or benefit) of those seen earlier. Good notes and making sure you refer back to them can help to avoid this.

• **Accuracy of recall** - Similarly, your memory of who said what can become blurred and distorted as the day progresses. Again, your notes will help to ensure you counteract this effect.

• **The 'halo-horns' effect** - Sometimes one particular element, whether positive or negative, can influence your overall judgment of a candidate. Try to avoid this by checking the candidate’s performance against the full range of your selection criteria.

• **The 'like me/us' syndrome** - It may often be tempting to favour people who seem similar to you or those already in the team. If this feeling is based on an objective judgement that the person best fits the selection criteria, then fine. But make sure that other factors are not influencing your decision and remember that the best teams have a range of people with different personalities and skills sets.

• **Personal liking bias** - Similarly you may find yourself feeling a preference for someone because they seemed the nicest person or someone you would have a lot in common with. Again, you need to focus on whether they are the person who best meets the selection criteria and will do the best job.

• **Interpreting information differently** - Different panel members may interpret the same information in different ways. This is why it’s so important for the whole panel to have a full and detailed discussion about each candidate to identify and discuss any differences in interpretation.

• **Unconscious prejudices and stereotypes** - If you or other panel members have any generic concerns and feelings ("gut feeling", "not sure they would fit in" etc.), try to identify the evidence this is based on and the selection criteria it relates to. If you can’t then this may indicate that some element of unconscious bias or stereotyping is creeping into your judgment.

• **Avoid making assumptions** about people based on personal appearance, name, how long ago they were at school or university, family or caring responsibilities etc. – focus on assessing each candidate objectively on how well they meet your selection criteria based on the evidence they provide to you.
5.9 Obtaining and checking references

References should be used to inform the final decision-making process by validating the information that the candidate has provided during the selection process. If you have any concerns about the information provided in a reference then you should contact your Faculty Human Resources Manager immediately.

For Research and Teaching roles a reference can provide important confirmation of the candidate's academic ability and track-record, and references are therefore taken up for all candidates short-listed for interview.

For Professional Services roles the reference is best used for confirming factual information such as employment history, and references are therefore taken up at the appointment stage for the selected candidate only, with the offer of employment made subject to receipt of satisfactory references.

All candidates are asked to provide the contact details of two people (three for academic and research roles) on their application forms who can act as employment referees for them. If the candidate has confirmed that they need to give permission before you contact a referee then you must always respect this. Such cases usually arise when the referee is the candidate's current employer, and the candidate does not wish to disclose that they have applied for another job until they have been invited for interview or, occasionally, until they are offered the job.

If you have agreed with your Faculty or Divisional HR Team that you will take up references for a Research and Teaching role locally, please be aware of the following:

- References should be requested in writing wherever possible. If telephone references are used, accurate records should be kept.
- When requesting a reference it is important to state clearly the information required, and include a copy of the further details of the vacancy. This tends to improve the validity and reliability of the response. It should be noted that many employers, particularly from the private sector, will only provide basic factual information relating to the person's employment. This is generally a policy decision and should not be seen as a negative comment on the person's suitability.
- Under the Equality Act 2010 it is no longer permissible to ask questions that aim to establish how many days of sickness absence an applicant has accrued during previous employment prior to the candidate being made a conditional or unconditional offer of work; this means that such questions cannot be included in any reference request.
- You may wish to use our example reference letter template as a guide.
• At the end of the process all references received should be forwarded to your Faculty or Divisional HR Team with the other interview documentation.

It should be remembered that references do provide potential for bias and unsubstantiated opinion. Also, anti-discrimination legislation and the Data Protection Act mean that the contents of a reference and its use in the selection process could be scrutinised or appealed against. Therefore if the contents of a reference are potentially going to play a major role in determining the most suitable candidate it is best to discuss the issues involved with your Faculty Human Resources Manager.

You may have heard about some employers using social networking sites to ‘check’ candidates out before proceeding to shortlist or offer employment. You are strongly advised not to enter into this practice: social networking sites often contain highly personal information which, taken out of context, should form no part in the selection process for employment; not least because this practice may lead to allegations of discrimination, as such sites will often identify the person’s age, sexual orientation, marital status etc.

These principles should also be born in mind when you are asked to provide a reference for someone and the University has guidance on writing references.

5.10 Starting salary

The University’s policy is that the starting salary for any appointment must be within the service increment range for the grade(s) at which the role has been evaluated and advertised.

An appointment at anything other than the first point of the grade must be based on an assessment of the anticipated contribution the new recruit will make in comparison with that of existing staff in the department and (where applicable) in similar positions across the University. This will need to be discussed with your Faculty or Divisional HR Team before any offer is made.

Any external factors effecting pay (i.e. market comparisons) will be considered outside of the starting pay policy; the Recruitment and Retention Payment policy provides a mechanism to address such market conditions, whilst maintaining the link between pay and job evaluation, through a separately identified addition to the salary range for a role.

5.11 Confirming the outcome and making a verbal offer

As soon as the panel has come to an agreed final decision on who should be offered the job you need to think about contacting the person to make what is commonly referred to as the ‘verbal offer’. This will then be followed up by the formal offer of employment letter and contract which will be issued by HR following your confirmation of the outcome.

Things to bear in mind when making the verbal offer:
• Do this as soon as possible, ideally by telephone, as any delay could be crucial if, for instance, the person has other job offers to consider;
• Be positive and enthusiastic - give the person some feedback on how well they performed;
• You will certainly need to discuss a potential start date, possibly confirm the salary to be offered and anything else that needs to be clarified.
• Check whether they have anything further they want to ask you at this stage.
• Without pressurising the individual, try to establish whether they are likely to accept the offer. In most cases the answer will be yes, but sometimes people may need some time to think. If this is the case try to agree a timescale for them to get back to you within.
• It’s worth briefly explaining what will happen next i.e. HR will issue a formal offer of employment and, for non-academic posts, references will now be taken up;
• Remember that anything you agree with the candidate at this stage is subject to the formal offer of employment being issued and a signed copy returned by the individual.

Confirming the outcome to HR

The chair of the panel (or a colleague working on their behalf who has been given eRecruit access to the vacancy) will need to record the outcomes for the candidates who have been interviewed in eRecruit, so that the appointment process and (where required) informing unsuccessful candidates can be initiated by your Faculty or Divisional HR Team. (Note - it is recommended that this action is carried out after the verbal offer to the successful candidate(s) has been made).

You should also send the interview forms and any other notes and documentation relating to the selection process to your Faculty or Divisional HR Team.

Confirming the outcome to the unsuccessful interview candidates

It is recommended that the Chair of the panel take responsibility for informing unsuccessful candidates (and provide a holding message to reserve candidates where required) either verbally or by email. If you require your Faculty or Divisional HR Team to inform unsuccessful candidates then this must be confirmed when the outcome of the interviews is recorded in eRecruit.

If you have appointable second- or third-choice reserve candidates, the outcome should not be confirmed until the verbal offer to the first choice candidate has been accepted and any on-going negotiations concluded.

If you are asked to provide feedback it is best practice to do so in writing (e-mail is sufficient). It is important to ensure your comments are factual and relate to the selection criteria and to your written records. If in doubt about what feedback to give or if a candidate requests data on the selection process (i.e. this is a formal Data Protection Request) then refer on to your Faculty or Divisional HR Team.
6. Appointment

6.1 The formal offer of employment

Your Faculty/Divisional HR Team will send the selected candidate a formal offer and contract of employment based on the information provided when the outcomes for the candidates who have been interviewed have been recorded via eRecruit. The recruiting manager will receive a copy of the letter and a summary of the appointment details.

The formal offer and contract will be sent to the successful candidate in a new starter pack that also contains the following:

- Staff record form - to enable the person’s details to be added to the HR and Payroll systems, to generate an e-mail address, id card etc.;
- A-Z guide to the University of Bristol;
- Other employment related information.

6.2 Pre-employment checks

A number of central checks need to be carried out by HR before the individual starts working:

References

For Professional Services posts references are only taken up for the appointed candidate. When received, the references will be emailed to the recruiting manager by the HR Faculty/Divisional Team to confirm that they are satisfactory. If there is any information within the references that raises any concerns about the appointment then this will need to be discussed with your HR Faculty/Divisional Team.

For Research and Teaching posts, references will have been taken up at the interview stage.

Occupational health check

Due to the requirements of the role, some appointments may be subject to satisfactory occupational health clearance by the University's Occupational Health Service (OHS). The assessment is to confirm that the candidate is fit to do the job to which they have been appointed. Such referrals are permitted only to determine whether an applicant can carry out a function that is intrinsic to the job.
Right to work in the UK check

The University has a legal requirement to check that all new employees have documentation confirming they have the right to work in the UK. This check is carried out by your Faculty/ Divisional HR Team (except in the case of certain departments outside of the main University campus).

Disclosure Barring Service (DBS) checks

There are a relatively small number of cases where the University is required to carry out a criminal records check. Checks are conducted via the Disclosure and Barring Service (DBS) and are necessary if the job involves working with children (under 18) and adults in vulnerable positions.

6.3 Certificate of Sponsorship for migrant workers

As an employer, the University has a legal responsibility to prevent illegal migrant working in the UK under the Immigration, Asylum and Nationality Act 2006.

Migrant workers are covered by a Points Based System (PBS) under which migrants have to accumulate points for factors such as qualifications, prospective earnings and English language competence in order to obtain entry clearance and leave to remain in the UK. In most cases the migrant is required to have a Certificate of Sponsorship (CoS) from a sponsor employer licensed by the UK Border Agency (UKBA); the University is a licensed sponsor employer for Tier 2 of the PBS, which covers skilled workers.

Where a migrant worker who requires permission to work in the UK has been appointed, your Faculty/ Divisional HR Team will co-ordinate the process of obtaining a CoS, using the UK Border Agency online system, and will work closely with the recruiting department.

This process should be followed where the candidate has explicitly stated in their application that they would require permission to work in the UK. It’s important to remember that the resident population of the United Kingdom contains a range of ethnic and national groups and there are also a wide range of people from outside the UK who are eligible to work here.

Further information on overseas nationals and obtaining permission to work in the UK can be found at www.bris.ac.uk/personnel/recruitment/additionalguidance/overseas/.

6.4 Relocation Expenses Policy

Policy Scope
This policy complements the University’s staff recruitment and selection processes and aims to support new staff in their relocating to take up a role at the University of Bristol.

Relocation assistance may be claimed by eligible new staff appointed on an open-ended (permanent) contract or a fixed term contract of one year or more (not including extensions to an existing fixed term contract).

Where the appointed member of staff currently lives outside a 50 mile radius of Bristol and moves within 30 miles of their new place of work they will be entitled to a relocation package as detailed below. Arrangements for this will be made through Human Resources.

All claims should be submitted within a year of the employment start date. However, if this not possible for exceptional personal reasons, it may be possible to agree a deferred time scale with the relevant HR Manager.

The HR Director’s decision is final in relation to the application of this policy.

Entitlements

Staff moving from within the UK

- A maximum of 7.5% of annual starting salary (gross) for costs incurred as listed below (inclusive of recruitment and relocation supplement, but excluding other allowances).

Staff moving from outside the UK

- One set of travel costs for employee (and immediate family members) to commence employment at the University of Bristol. In the case of air travel, return tickets will only be reimbursed where evidence is provided that this is cheaper than a single fare (the definition of who meets the criteria of ‘family’ must be made in agreement with the University).
- Additional costs incurred as listed below to a maximum of 7.5% of annual starting salary (gross)

Externally Funded Research Fellows

- If travelling expenses are included in the grant only additional incurred removal costs (as detailed below) can be claimed, up to a balance of £1,000. Please contact your Faculty HR Team to confirm your entitlement.

In exceptional cases the HR Director is empowered to authorise the reimbursement of removal expenses in excess of the above limits.

Expenses that can be reclaimed

In all cases, staff claiming expenses should seek the best value possible and the University reserves the right to only pay up to this value where it is exceeded:
- Removal of furniture and associated insurance (either via a removals company or by hiring a van and claiming for cost of van hire and fuel).
- Shipped packages.
- Storage costs.
- Professional fees when purchasing another property.
- Agency fees/travel costs for finding property either rented or to purchase.
- Costs of hotel (or equivalent) accommodation whilst visiting the area to secure a property (bed and breakfast up to £70.00 per night, other meals will not be reimbursed). NB this does not cover on-going temporary accommodation before moving into a more permanent home.
- Temporary accommodation when maintaining a mortgage or other accommodation elsewhere. Please note that, in order to claim for this, proof of mortgage and a copy of the signed tenancy agreement for the temporary accommodation are required, plus copies of bank statements showing payment of both rent and mortgage for the period in question. Payment will only be made where dates clearly coincide and can only be paid retrospectively.
- Half of the interest of a bridging loan with regard to purchasing property.
- Stamp Duty when purchasing property.

Expenses not covered under this relocation scheme

- Removal of office and laboratory effects (This will need to be discussed with the employing department where assistance towards these costs may be reimbursed separately)
- Mortgage Guarantees
- Accommodation Deposits
- Van Hire Deposits
- Meals and subsistence
- Any other expenses associated with relocation

Making the claim

- All expenses must be claimed by a removal expense claim form and sent to your Faculty/Division HR Team with the original copies of your receipts.
- All claims must be backed by original receipts. Unfortunately bank statements or visa/credit card receipts alone cannot be accepted (except in the case of reimbursement for immigration visa costs, where receipts may not be provided).
- Claims should be submitted retrospectively since reimbursement can only be made after expenses have been incurred.
- Claims may be made either as one submission or in several installments as they are incurred (provided this does not exceed the maximum entitlement).
- Claims may be submitted in a foreign currency but will be reimbursed in £ sterling using the exchange rate applicable at the date on which the expenses were incurred. (i.e. date of receipt)
- Relocation expenses which exceed £8,000 are liable for UK tax.
Once authorised by Human Resources, Finance Services will arrange for you to receive reimbursement together with your monthly salary. Claims should normally be received in HR by the 1\textsuperscript{st} of the month in order to receive payment with that month’s salary. It should be noted that failure to provide the necessary documentation may result in delays in payment being made.

Should you wish to discuss any aspect of your claim please contact your \textit{HR Team}.

**Leaving the University**

In the event of a member of staff who has received a contribution towards relocation in line with this policy leaving the University within 3 years of taking up an open-ended post or before they have completed 50\% of a fixed term contract, the University will require the staff member to repay on a pro-rata basis any financial assistance as follows:

- Less than one year from start of employment – 100\%
- More than one year but less than 2 years from start of employment – 50\%
- More than 2 years but less than 3 years from start of employment – 25\%
- More than 3 years from start of employment – 0\%

**6.5 Planning the induction**

It is vital to ensure that the new starter has a \textit{well-planned induction} to ensure they receive all the information, training and support they need to become fully operational quickly and enjoy a positive start to their employment at the University.

Every department has an \textit{Induction Co-ordinator} and you should liaise with this person to ensure that a thorough induction programme is set up in advance of the start date.

**6.6 Initial service review**

All new starters are subject to an \textit{initial service review} designed to:

- support them while they are settling into the University
- assess their suitability for the job and
- provide a framework within which any areas of concern can be identified, addressed and resolved.

The review period is the first 12 months of employment for research and teaching staff and for professional/administrative staff at grades J and above. The review period is the first 6 months of employment for other staff.
During the initial service review period, a number of formal review meetings need to take place and be recorded. Your Faculty/Divisional HR Team will contact the new starter’s line manager in advance at each of these points to initiate the process. It is advisable to take the opportunity to review the effectiveness of any reasonable adjustments or flexible working arrangements during these meetings.

6.7 Record retention

The interview forms and any other notes and documentation relating to the selection process should be returned to the your Faculty/Divisional HR Team at the end of the process.

They will be retained for the relevant statutory period and can be referred back to if necessary. If you receive a request for feedback from an unsuccessful candidate after the records have been returned, you should contact your Faculty/Divisional HR Team.

Additionally, electronic records of the recruitment process will be retained centrally on the eRecruit system.