Best practice recruitment and selection – a tool kit for the community sector

Victoria
The Place To Be
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1 Introduction

1.1 Purpose of this tool kit

This tool kit has been developed to assist the community sector in the application of best practice in the recruitment and selection process. This, in turn, supports the broader objectives of meeting workforce capability needs.

This tool kit represents an end-to-end best practice recruitment and selection process, from planning to evaluation.

The tool kit comprises an overview of the recruitment and selection process, information sheets, and templates provided online.

This tool kit has been produced to assist community sector staff in the application of best practice in recruitment and selection. The templates can be adapted to suit specific organisational needs.

1.2 Project context

Working in collaboration, the State Services Authority (SSA) and the Office for the Community Sector (OCS) have adapted this toolkit to suit the recruitment and selection needs of the community sector.

The tool kit complements recent work completed on the *Community Sector Workforce Capability Framework* as part of the *Strengthening Community Organisations Action Plan* by the OCS, aimed at assisting organisations to align their workforce with the environment in which they operate.

The Framework is intended to help identify the skills that organisations within the sector need to undertake their work and is able to be used in the development of job descriptions, identification of training requirements and to ensure that organisations have the right range of skills and knowledge now, and in the future, to meet their organisational aims.

1.3 The State Services Authority

The State Services Authority's (SSA) publication *Future Directions for Workforce Planning: Actions to Improve Workforce Planning Outcomes Across the Victorian Public Sector* assessed the extent of workforce planning challenges facing the Victorian Public Service (VPS) and the Sector and proposed six strategic goals. One of these is to improve attraction and recruitment strategies.

Arising from the recommendations outlined in the above report, the SSA undertook a project which involved two components:

- a literature review that identifies best practice and relevant models of recruitment and selection processes;
- development of a methodology and tool kit to assist the VPS and the Sector with recruitment and selection.

The SSA commissioned Monash University's Associate Professor of Psychology, Psychiatry and Psychological Medicine, Sally A. Carless to undertake the literature review.

The research document *Literature Review on Best Practice Recruitment Selection Techniques* (Carless Report) identified best practice for each phase in the recruitment and selection process. A copy of the research document is available online at **www.dpcd.vic.gov.au/communitysector**.

The SSA with Deloitte and SACS Consulting developed a methodology and tool kit based on best practice. Information from the Carless Report was used to:

- analyse current recruitment and selection practice in the VPS against identified best practice; and
- develop tools based on best practice to assist human resource practitioners.

1.4 The Office for the Community Sector

The Victorian Government has established the Office for the Community Sector (OCS), within the Department of Planning and Community Development, in order to support the long term sustainability of the not for profit community sector.

The OCS is working in partnership with the community sector to implement the *Victorian Government's Action Plan: Strengthening Community Organisations*.

Building the capacity of community organisations through initiatives such as the development of the *Community Sector Workforce Capability Framework* and this *Best Practice Recruitment and Selection Tool Kit* are key components of the Action Plan.

2 What is best practice?

The Carless Report outlines best practice as predicting who would be the best person for a role using a variety of recruitment and selection methodologies. The best practice approaches are discussed in the following sections.

The tips, tools and techniques in this tool kit have been developed to assist in selecting the best person for a role.

Applying best practice indicates that only job related factors are considered in the recruitment and selection assessment. Merit and other employment principles are inherent in the best practice recruitment and selection process.

More information about the Victorian public sector merit and other employment principles and standards can be accessed on the **SSA website** at **www.ssa.vic.gov.au**.

Best practice recruitment and selection processes

Figure 1 provides a representation of best practice recruitment and selection processes based on research in the Carless Report. The process is based on a clearly defined methodology for recruitment and selection.

The process outlined aims to ensure that all necessary steps are given due consideration and occur in a timely and efficient manner to support an effective yet speedy selection process.

Figure 1 illustrates each stage of the recruitment and selection process as follows:

– Stages 1 and 2 include the activities that occur prior to assessing candidates for selection i.e. planning the recruitment and selection process, undertaking job analysis to determine the recruitment and selection criteria, and developing key selection criteria and position descriptions based on the job analysis.
– Stage 2 outlines the attraction activities.
– Stage 3 includes the specific selection steps that take place to make a selection decision.
– Stage 4 includes the steps that need to take place to support the selection decision. Induction/orientation and evaluation of the selection methods and process are integral to a good recruitment and selection process.

The 'activity' row includes broad tasks associated with each step in the process.

The 'tools' row includes the references to the information sheets and templates available in this tool kit that support the particular recruitment and/or selection step.

The timeline[1] outlined in Figure 1 provides a guide for each stage of the recruitment and selection process.

Basing recruitment activity on these timeframes provides a more efficient process for the organisation and also benefits applicants.

1 The timeframes are based on best practice research including information outlined in the Australian Public Service Commission's publication *Better, Faster: Streamlining Recruitment in the Australian Public Service*.

Figure 1

Best practice recruitment and selection process

	Stage 1			Stage 2	Stage 3
Process	**Planning**	**Job analysis**	**Position description and key selection criteria**	**Recruitment attraction**	**Short-list application**
Activity	– Plan selection process and timeframes – Identify selection techniques – Schedule other people involved in selection	– Identify tasks/ capabilities required to perform the role – Prioritise most important tasks/ capabilities – Develop assessments measuring the tasks/ capabilities	– Turn tasks/ capabilities into KSC – Develop position description	– Identify and attract a pool of qualified candidates	– Use a standard application form – Record and acknowledge applications – Undertake short-listing
Tools	**Templates A and B**	**Information sheets 1-3**	**Information sheets 4-6** **Template C**	**Information sheets 7-8** **Template D**	**Information sheet 9**
Timeline	**Day 1**	**Day 2**	**Day 3**	**Week 1-4**	**Week 4**

KSC = key selection criteria

Stage 3 continued			Stage 4	
Selection process	**Reference check**	**Selection decision**	**Induction/ orientation**	**Evaluation**
– Conduct interview and/ or other assessment techniques – Use a rating method to assess applicants	– Undertake reference checking – Use a rating method to score responses	– Combine selection data – Identify applicant who best meets the selection criteria	– Arrange a structured induction – Arrange a buddy – Obtain formal feedback from new starter – Monitor and manage probation	– Evaluate selection processes
Information sheets 10-12 **Template E**	**Information sheet 13** **Template F**	**Template G**	**Information sheets 14-17** **Template H**	**Template I**
Week 5	**Week 5**	**Week 5**	**Week 7**	**Ongoing**

What is the cost of a poor recruitment and selection process?

A poor recruitment and selection process increases the probability of a poor hire and this can have a significant impact on the organisation financially and non-financially.

The financial cost of hiring a poor recruit extends beyond the costs involved in appointing the person. It also extends to the ongoing salary costs of the person and, where a probation period is not managed efficiently or where a position turns out to be quite different to the position that was advertised, legal costs.

A poor recruitment decision can also have a demoralising effect on staff as their roles may be affected while time, money and effort are spent bringing the recruit up to standard, impacting the motivation to carry out their own roles and possibly the productivity of the organisation.

How to use this tool kit

This tool kit builds on the *Community Sector Workforce Capability Framework* (available online at **www.dpcd.vic.gov.au/communitysector**) and provides a guide to best practice approaches for each stage of the recruitment and selection process.

A glossary of terms and a section outlining additional resources are provided in the appendices to this document.

The tool kit also includes:

- information sheets on each stage of the recruitment and selection process. These information sheets provide practical, detailed information about particular processes referred to in this document and provide guidance on how organisations can best approach the recruitment and selection process; and
- electronic templates for recruitment and selection processes which can be adapted to suit an individual organisation's needs. These are available online at **www.dpcd.vic.gov.au/communitysector**.

References to the specific information sheets and templates are made throughout this document.

The following sections, 2.1 – 2.9, provide an overview on the application of best practice as well as a guide to the rationale behind each stage. It is important to note the relationship between each stage and the effect that neglecting the initial planning stages can have on the overall process, in terms of the impression applicants may form of the organisation, and in terms of recruiting the right person for the role.

These sections are intended to provide a broad understanding of the process.

For more detailed information on how these stages may apply in your organisation, refer to the specific information sheets.

2.1 Planning the recruitment and selection process

Upfront planning includes thinking about the steps in recruitment and selection early, and scheduling the activity, resources and time to support the process. Planning is essential in the recruitment and selection process as it ensures the best possible process is followed. It helps to manage time constraints and streamlines the recruitment and selection process for both the organisation and applicant.

Planning is crucial as it allows analysis and design of the position to be filled to meet the organisation needs at the time and in the future. The departure of a staff member provides an opportunity to consider and analyse whether the position itself should change in order to provide increased benefit to the organisation.

Good planning also positively affects an applicant's experience of the recruitment and selection process and their perception of the organisation. When the recruitment process is clear, it allows the recruiter to take a methodical and professional approach to the task. This in turn, influences their likelihood to complete the recruitment process and accept an offer of employment.

Reference to 'planning' and 'the process' in this tool kit includes the administrative activities underpinning the recruitment and selection process, as well as how applicants are managed.

Templates to assist in planning your recruitment selection process are available online at **www.dpcd.vic.gov.au/communitysector**. A planning template is available to record actions, and timeframes. An assessment plan template provides guidance on planning recruitment and selection techniques that will be used to capture necessary information to underpin an informed and appropriate decision.

2.2 Job analysis

Job analysis involves determining the knowledge, skills and attributes[2] (KSA) required to perform in a particular role.

Job analysis is critical to recruitment and selection because it is the foundation of a high quality process. When done well it identifies not only the skills and knowledge required to perform a role, but also the attributes that can be used to assess 'cultural fit' within an organisation. Job analysis helps to identify the key selection criteria and inform the position description, which are both key aspects in attracting suitable candidates. A poor job analysis is likely to adversely affect the quality of outcomes, irrespective of how well the rest of the selection process is executed.

For example, without proper job analysis, interviewers may develop incorrect beliefs about the position requirements and hire a person unsuitable for the role.

More information on job analysis is provided in:

- *Information Sheet 1: Job analysis process flow diagram*;
- *Information Sheet 2: How to determine required knowledge, skills and attributes*;
- *Information Sheet 3: How to determine job outcomes or key result areas*;
- *Information Sheet 4: How to develop key selection criteria*;
- *Information Sheet 5: Assessing person-organisation fit*; and
- *Information Sheet 6: Developing/ revising position descriptions.*

A position description template is available online at **www.dpcd.vic.gov.au/communitysector**.

2.3 Attraction

Attracting the right candidates to apply for vacant roles is an important step in the recruitment and selection process. It is important to understand how your attraction strategy has worked by evaluating the process undertaken.

Attraction is the result of a range of activities and processes, including employer branding, employment value proposition, recruitment and induction. Attraction strategies provide opportunities for an organisation to market and communicate the benefits they can offer applicants.

2 The term 'attributes' is used instead of 'abilities' as this enables the capture of the inherent person requirements that are additional to the 'learned' abilities of a person.

2.4 Short-listing

The **short-listing process** involves determining which applicants meet the minimum key selection criteria to perform the job satisfactorily, and/or ranking applicants to progress to the next stage of the selection process.

Short-listing candidates supports an efficient applicant assessment process through ascertaining whether candidates meet the relevant criteria, and reduces the applicant pool to a manageable size.

Best practice techniques in short-listing applicants include using a standard application form that:

- standardises the format and information collected from applicants to reduce potential subjectivity in the assessment process;
- contains statements confirming that the form has been reviewed for fairness and equity;
- communicates who will see the information, privacy, how information will be used in the recruitment and selection process, and state that applicants may be required to verify the information provided;
- uses a scoring procedure to evaluate whether applicants meet the key selection criteria or determine ranking for the next stage of the process; and
- develops, where possible, a talent pool (with applicants' permission) of those who were not successful for this particular position, but who may be suitable for an alternative position.

More information on short-listing is provided in *Information Sheet 9: Using a standard application form for short-listing.*

2.5 Selection process: interviewing and additional assessment

Interviewing

Interviewing is the most commonly used selection technique. It can be expensive, time consuming and most organisations do not maximise its value. However, if used appropriately, interviewing can be a good predictor of work performance.

Research suggests that many organisations conduct unstructured interviews (i.e. have the person in for a 'chat' to see what they are like). They may also simply ask the same questions of each applicant believing this constitutes a 'structured' interview. This is only considered best practice if the structured questions are behaviourally-oriented.

The aim of behaviourally-oriented questions is for the applicant to demonstrate through past behaviour that they meet the required KSC e.g. 'Please describe a time when you had to raise funds for a particular purpose within an organisation. What was the situation, what did you do and what was the result?'

Interviewing that is not behaviourally-oriented (structured or not) does not align with best practice and is not considered an effective and consistent method of predicting work performance. The key selection criteria arising through the job analysis should be used to create the behaviourally-oriented interview questions.

Where a candidate does not meet all criteria to the required level, the interview also provides an opportunity for the organisation to consider the candidate's potential to grow into the role.

In order to assess this potential, it is important to have questions that cover how the candidate might gain the skills and knowledge necessary to fill the role, for example, covering openness to further study or asking how the applicant learns best. This may also provide an opportunity to sell the role to a larger pool of candidates via learning and development opportunities.

In order to ensure that assessments made during interviews are objective, it is advisable that more than one person be involved in conducting the interview and in some circumstances for someone external to the organisation, but with the appropriate interviewing skill, to assist in this process. It is also important to advise candidates who will be conducting the interview.

Using additional assessment techniques

The Carless Report indicates that additional assessment techniques can enhance the quality of hire. Additional techniques add more value to structured, behaviourally-oriented interviews by providing a higher level of accuracy in predicting on-the-job performance.

Additional assessment techniques may take a number of different forms. They could include psychometric testing (personality or cognitive ability), work sampling, or job knowledge testing. Additional assessment techniques should be aligned with the role type and level.

The outcomes of the additional assessment techniques should then be incorporated in making the selection decision.

Note: The additional assessment techniques outlined in this tool kit are best administered, and the results analysed, by trained professionals, such as organisational psychologists.

Avoiding discrimination

For information on avoiding discrimination in the recruitment process, refer to the *Victorian Equal Opportunity and Human Rights Commission's guide*, *A Fair Go for Job Seekers – Best Practice Guidelines for the Recruitment Industry and Employers* at **www.humanrightscommission.vic.gov.au/pdf/recruitment%20guidelines.pdf**.

More information is provided in the information sheets: *Preparing for interviews, How to use a descriptively anchored rating scale and Additional assessment techniques*. An interview scoring template is also provided at **www.dpcd.vic.gov.au/communitysector**.

2.6 Reference checking

Reference checks are generally used to obtain the following information:

- employment dates
- appraisal of an applicant's claim against the key selection criteria
- estimates of an applicant's job performance capabilities
- employer's willingness to re-hire the applicant.

Professional referees (i.e. a previous employer) should be contacted to provide information on the applicant. If an applicant does not provide professional referees, and does not have a legitimate reason, this could indicate issues around their past experiences. It is advisable to explore reasons as to why recent previous employers' details are not given.

Telephone reference checks are the most frequently used method of reference checking. This method has a number of advantages:

- high return rate
- allows the reference checker to ask follow-up questions for clarification
- it is inexpensive to conduct
- speed.

A structured approach to reference checks improves its value. A standardised questionnaire that requires referees to rate the applicant's standing on a number of job relevant attributes (rating scale 0–5) with a descriptively anchored response format should be used.

Mandatory checks (e.g. police checks) are an important part of the recruitment and selection process. These checks must be added into the recruitment and selection process as relevant to the organisation.

A standard reference check template is available online at **www.dpcd.vic.gov.au/communitysector.**

2.7 Making a selection decision

It is common throughout organisations to make subjective judgements to assess an applicant's suitability to the role. This does not align with identified best practice.

Best practice is to use a scale (for example 0-5 with descriptors for each point of the scale) to rate each assessment and then combine all ratings for each assessment activity, for each applicant, throughout the recruitment and selection process to provide the basis for a decision. This is an especially good method when more than one selection technique is used. This approach means the selection decision is more objective, removing the risk of bias or 'gut feeling' which is not backed up by evidence.

A template that allows you to record individual applicant scores is available online at **www.dpcd.vic.gov.au/communitysector**.

2.8 Induction/orientation

Induction/orientation facilitates a new starter's adjustment into an organisation. Effective orientation is an investment in employee morale, productivity and retention.

Industry best practice suggests induction/orientation should involve:

- conducting a structured induction process that covers tactical and administrative issues
- using a buddy system
- obtaining formal feedback from new starters after a specified time in the new role
- monitoring and managing probation.

More information on induction/orientation is provided in the information sheets: *Structured induction process, The buddy system, Managing job expectations and Probation periods.* An induction checklist is available online at **www.dpcd.vic.gov.au/communitysector**.

2.9 Evaluation

Collecting accurate information is essential to not only understand what is taking place, but also to ensure correct interpretation of the facts.

A gap analysis assessment tool has been developed to provide a resource for the sector to assess recruitment and selection processes against those defined as best practice.

The tool is a questionnaire based on the following dimensions:

- job analysis and key selection criteria
- short-listing
- interviewing and additional assessment
- induction/orientation
- the process (which includes evaluation of the selection process).

This tool can help the sector identify areas where they can improve their implementation of best practice and also measure their improvement over a number of years through annual assessments.

A gap analysis assessment tool to use in evaluating recruitment and selection practices is available online at **www.dpcd.vic.gov.au/communitysector**.

3 Glossary of terms

applicants are individuals who apply for a vacant role.

attributes are the inherent personal requirements that are additional to the 'learned' abilities of a person.

behaviourally-oriented questions probe the applicant to recall a past behaviour to demonstrate their ability to meet the knowledge, skills and attributes being measured.

best practice is based on predicting who would be the best person for a role using a variety of selection methodologies.

candidates are individuals who are the target market and potentially may apply for vacant roles.

capabilities describe the basic skills, knowledge and attributes people need to demonstrate in order to do their work effectively.

cognitive ability test is a psychometric test for measuring an individual's abilities e.g. verbal and numeric.

descriptively anchored rating scales (DARS) uses a description of the key selection criteria to correspond with a numerical rating. They are used to rate applicants' responses to questions.

employee value proposition (EVP) is a combination of benefits, image and emotional messages to promote interest in employment.

induction/orientation is the first step in building a relationship between the organisation and the employee once employment has commenced.

job analysis involves determining the required knowledge, skills and attributes to perform in a particular role.

key result areas outline the outcomes of a role and why it is important. They are the business outcomes which are necessary to have achieved in order for the new employee to be considered 'successful'.

key selection criteria (KSC) are the criteria developed to assess whether candidates have the requisite knowledge, skills and attributes in order to be able to perform in a particular role.

knowledge the information/ understanding a candidate requires to perform a role.

knowledge, skills and attributes (KSA) are the particular requirements the person needs to successfully perform the tasks of a role.

O*NET is a free on-line resource which can used as a starting point for a job analysis process. It provides information on both the task and person requirements. It is available at **www.online.onetcenter.org**.

orientation assists newcomers adjust to their new surroundings and learn the behaviours, attitudes, and skills necessary to fulfil their new roles and function effectively.

person-organisation fit is the extent to which an individual's values match those of the organisation.

short-listing is used to reduce a large applicant pool to a smaller, more manageable size.

skills the ability a candidate requires to perform a role.

talent pool involves seeking expressions of interest from people to include their details in a database for consideration for employment opportunities.

4 Additional resources and links

- American Psychological Association, *Standards for Psychological Testing*, available at www.apa.org.
- Australian Public Service Commission 2007, *Better, Faster Streamlining Recruitment in the Australian Public Service*, Commonwealth of Australia, available at www.apsc.gov.au.
- Carless, S.A. 2007, *Literature Review on Best Practice Recruitment Selection Techniques*, Monash University, Melbourne.
- Department of Planning and Community Development 2009, *Community Sector Workforce Capability Framework Toolkit* (pilot), Melbourne.
- Hoevemeyer, V.A. 2006, *High Impact Interview Questions: 701 Behavior-¬based Questions to Find the Right Person for Every Job*, American Management Association, New York.
- Lee, D. *How to Avoid the Four Deadliest Onboarding Mistakes. And Why You Need to Get Onboarding Right*, 22 November 2005, available at www.ere.net/articles/db/3F9DEDC4BD074E23A72AD98B938382CA.asp.
- O*NET website available at www.online.onetcenter.org.
- Public Sector Standards Commissioner 2006, *Standards: Application of the Public Sector Employment Principles*, available at www.ssa.vic.gov.au.
- Public Sector Standards Commissioner 2006, *Guidelines: Equal Employment Opportunity*, available at www.ssa.vic.gov.au.
- Public Sector Standards Commissioner 2006, *Guidelines: Merit in Employment*, available at www.ssa.vic.gov.au.
- Recruiting Roundtable 2005, *Achieving Operational Excellence in Recruiting: a New Framework for Breaking the Quality-time Compromise*, Corporate Executive Board, Washington.
- State Services Authority 2006, *VPS Employment Capability Framework Card Set and Victorian Public Employment Capability Framework Card Set*, available from the State Services Authority.
- State Services Authority 2007, *Future Directions for Workforce Planning: Analysis and Discussion*, available at www.ssa.vic.gov.au.
- Thornton III, G.C. 1992, *Assessment Centers in Human Resource Management*.
- U.S. Federal Government 1978, *Uniform Guidelines on Employee Selection Procedures*, 29 CF Part 1607, available at www.uniformguidelines.com.
- U.S. Office of Personnel Management, *Assessment Decision Guide*, available at http://apps.opm.gov/ADT.
- Woodruffe, C. 1993, *Assessment Centres: Identifying and Developing Competence*, (2nd ed.), IPM, Wimbledon.

Best practice recruitment and selection

Stage 1 – Planning

Victoria
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Information sheet 1

Job analysis

The key steps in job analysis are as follows:

	Step 1	Step 2	Step 3	Step 4
Process	**Understand the tasks**	**Understand the job**	**Develop selection criteria and decide techniques**	**Review position description**
Activity	Develop a list of tasks performed on the job by: – observing or interviewing job experts (such as the line manager and/or the incumbent) – using O*NET.	Develop a list of KSA for the role by: – observing or interviewing job experts – using the capability framework – asking job experts to rate job tasks and KSAs most critical for effective performance.	Develop clear and unambiguous KSC to assess the degree to which applicants possess the requisite capabilities. Select or develop recruitment selection techniques that measure the KSC.	Develop or modify current position descriptions to reflect the KSC identified by job analysis.
Tools	**O*NET**	**Capability Framework** **Information Sheets 2-3**	**Information Sheet 4**	**Information Sheets 5-6**

The key steps in job analysis are as follows:

1. Understand the tasks related to the current job

– Observe or interview job experts (i.e. the incumbent and the line manager) to develop a list of tasks performed on the job. Alternatively, an online tool such as **O*NET**[3] can be used to review the task descriptions.
– Tasks include role responsibilities and duties, that is, what the person actually does in the role – such as assessing clients, writing reports, and presenting to committees.

Tip: In some cases, the incumbent may no longer be in the organisation to assist with the job analysis. In such cases, the O*NET tool is useful or the line manager may undertake the job analysis themselves with assistance from staff responsible for recruitment.

Tip: The job analysis process can be aided by the use of the *Community Sector Workforce Capability Framework Capability Cards*.

2. Understand the capabilities (knowledge, skills and attributes) required for the position

– Interview or observe the incumbent, line management and/or members of the incumbent's team to develop a list of capabilities (knowledge, skills and attributes) that the applicant must possess upon entry to perform the role effectively. This is distinct from that which can be learnt on the job. Refer to *Information sheet 2: How to determine the required capabilities* and *Information sheet 3: How to determine job outcomes or key result areas*.
– Ask the incumbent, line management and/or members of the incumbent's team to rate which job tasks and capabilities are most critical for effective performance.

3. Turn the capabilities (knowledge, skills and attributes) into key selection criteria

– From the capabilities that have been identified as necessary to perform in the role, develop clear and unambiguous KSC to assess the degree to which applicants possess the requisite capability. Refer to *Information sheet 4: How to develop key selection criteria* for more information.
– Select or develop recruitment and selection techniques that measure the capability.

3 O*NET is a free on-line resource which can used as a starting point for a job analysis process. It provides information on both the task and person requirements. It is available at www.online.onetcenter.org.

4. Review position description

– Develop or modify current position descriptions to reflect the KSC identified by job analysis. Refer to *Information sheet 5: Assessing person-organisation fit* and *Information sheet 6: Developing/revising position descriptions* for more information.

Tip: Relying on existing position descriptions when filling a vacant position is not best practice. Undertaking a structured job analysis helps to identify what is really required for the position.

Tip: Use job analysis to identify the parameters you have for flexibility by:
– providing training to develop an applicant who demonstrates potential to meet the KSC in time (i.e. if you do not get a candidate that meets all the job requirements);
– redesigning the job to meet the requirements of the applicant – this may include job sharing, changing a full time role to part time, or making reasonable adjustments for a person with a disability;
– offering flexible work hours; and
– providing remote access to organisational systems to allow working from home.

2

Information sheet 2

How to determine the required capabilities

To successfully perform the role there are certain capabilities (knowledge, skills and attributes) that a person requires.

Capabilities		
Knowledge	**Skills**	**Attributes**
What the person needs to know in order to perform in the role	The specific skill/ability needed to meet the required outcomes of the role	Personal characteristics/ style/values relevant to perform in the role and to align with the organisation
e.g. industrial relations.	e.g. problem solving.	e.g. client/member focussed.

KSA can be described as enduring skills or abilities and/or trait-like features. The competencies and characteristics help identify which applicants are most likely able to perform in a particular role.

The table below provides a brief example of KSA which may relate to a position; it is by no means an exhaustive list. The capabilities and personal attributes are taken from the Capability Framework.

Example of KSA for a Care Manager			
		Capability streams used to establish skills required	**Personal attributes used to establish attributes required**
Required knowledge (K)	Good understanding of theory and practice of aged and disability service provision Good understanding of assessment, counselling, liaison, advocacy Working knowledge of high quality case management service/provision		
Required skills (S)	Advocacy (to advance interests of clients) Communication (written and oral) Effective liaison, networking and collaboration Problem solving Planning and organising Interpersonal skills (active listening, empathy, social awareness, emotional awareness)	Partnerships and collaboration Time management Problem solving Advocacy Communication Client member outcome Knowledge of client issues Interpersonal skills	
Required attributes (A)	Client focussed (prioritises needs/aims for best outcomes/follows through) Committed to social inclusion Team player Empathetic Respects difference Manages own time (to achieve goals/outcomes)		Client member focussed Culturally aware Inclusive Collaborative Supportive Self disciplined

Developing knowledge, skills and attributes

The hiring line manager and incumbent should work together to determine which capabilities are necessary to perform the role. In some cases, the incumbent may no longer be in the organisation in which case the hiring line manager may determine the capabilities themselves with assistance from staff involved in the recruitment process.

Refer to the existing position description, and add or remove capabilities after assessing the *current* requirements of the role (this is done by the hiring manager observing incumbents or interviewing incumbents to develop a list of tasks).

– use the O*NET resource for guidance on what tasks are involved in the role. It is available at **www.online.onetcenter.org**.

Use the O*NET resource for guidance on what general capabilities are necessary

– O*NET provides descriptors for occupations and the related tasks, knowledge, skill and abilities/attributes, among various other categories of information on occupations.

Use the *Community Sector Workforce Capability Framework Capability Cards* to determine which capabilities are required for the role:

– These card sets assist in identifying the capabilities required to perform a specific role. They can help determine:
  - which capabilities are critical to perform in the role (must haves)
  - which are desired for the role (nice to haves)
  - which are not necessary/not utilised in the role (not applicable).
– This resource can also help determine the critical capabilities required before starting in the role and those that can be learnt on the job.

Once the capabilities for the job are determined, the next step is to understand what the key outcomes or key result areas are for the role. That is, determine how in time you will know the new employee has been a successful hire – refer to *Information sheet 3: How to determine job outcomes or key result areas*.

Information sheet 3

How to determine job outcomes or key result areas

After determining what tasks and capabilities are required for the role, it is important to decide what the new employee is to *achieve* in this role. That is, determine what **key result areas** (or outcomes) are necessary in order for the new employee to be considered 'successful'.

The outcomes of the role should be determined using the following goal setting principle:

S = specific
M = measurable
A = appropriate
R = realistic
T = time-bound.

An example of a key result area is 'Decrease workplace accidents by 5 per cent over the next 12 months'. This simple key result area matches the SMART principle.

Tip: There is a need to move away from 'recruitment to vacancy' towards 'recruitment to capability'. This requires a far greater emphasis on planning for recruitment rather than waiting for vacancies to appear[4].

Identifying job outcomes or key result areas produces practical goals which research has indicated enhances employees' job satisfaction and engagement. It is also important to identify key result areas that are typical of the role and are flexible enough to evolve with the job or be transferable to other areas of the organisation.

The table below provides a set of example key result areas which may be related to a Care Manager role. It is by no means an exhaustive list.

4 *Future Directions for Workforce Planning: Analysis and Discussion*, State Services Authority, 2007

Key result areas for a Care Manager

Key result area	Indicators
Case manage a caseload at optimal level	Care Manager to maintain caseload of (insert number) clients.
Strengthen client's community connections and greater independence with input from clients where possible	Aiming at (insert number) per cent of caseload being linked into community based support within 12 months and positive feedback from clients (relaying information to other care managers as their clients may have similar interests).
Care plans developed in consultation with relevant parties	Care plans up to date and relevant to ensure best provision of service for clients.
Improve existing network contacts with key players in relevant municipalities	Have one contact per month by visiting centre or via telephone.
Obtain current information on the variety of client services and relevant professional agencies in the municipalities of (list municipalities here) for use by this program	Develop a resource list of the relevant services/agencies for access by all Care Managers within (insert number) months.
Increase knowledge and expertise in palliative care services	Work on production of palliative care resource folder for all Care Managers and visit (insert number) palliative care services within (insert number) months.
Increase knowledge and skills in middle management roles for Care Managers	Undertake learning opportunities and take on additional responsibilities consistent with a line management role for four weeks per year.

4 Information sheet 4

How to develop key selection criteria

Information obtained from the job analysis process is used to develop the **key selection criteria (KSC)** that is to be used to assess the requisite **capabilities.**

KSC are used to assess applicants on past behaviours and experiences in order to determine whether they have *demonstrated* they have the requisite knowledge, skills and attributes (KSA), as opposed to simply saying they meet the criteria.

Key considerations in developing KSC include:

- Has a job analysis been conducted? The quality of job analysis has a direct and significant impact on the development of KSCs.
- Is the KSC *critical* to the role (i.e. a *must* have)? Or is the KSC just an additional benefit if the applicant has it (i.e. a *nice* to have)?
- If the KSC is not critical, it is not a *key* selection criterion and should not be included.
- KSC should be stated in clear and unambiguous language.
- Is the criterion succinctly described?
- All types of candidates, irrespective of whether they are from the community sector or the private sector, should be able to understand the language being used.
- Does the KSC contain jargon?
- Five or six KSC are usually sufficient to assess the requisite KSA.

Tip: While assessing candidates against KSC it is also important to ensure that the use of KSC does not place additional demands on candidates, especially in a tight labour market. Therefore, consideration should be given to whether candidates should be required to respond to KSC at application or at a later stage in the recruitment and selection process.

5 Information sheet 5

Assessing person-organisation fit

Person-organisation fit is the extent to which an individual's values match those of the organisation.

Currently there is no robust measure available to effectively assess an individual's degree of fit with an organisation, although there are methods that may offer some insight as to the degree of alignment. These methods could include:

– clearly stating organisational values or mission statements (where applicable) in the position description, so candidates can self-assess their degree of fit with the organisation;

– using behaviourally-oriented interview questions to determine person-organisation fit: key attributes determined through job analysis can assist in determining the level of fit e.g. the attribute is 'demonstrates a commitment to quality customer service';

– the following behaviourally-oriented interview question assesses the applicant – 'Please give me an example of a complex client service issue you needed to deal with recently. What was the issue and how did you resolve it?'; and

– asking pertinent reference check questions around an individual's values: 'Please describe a time when … demonstrated a commitment to customer service. Was this typical of the way … dealt with clients?'

6 Information sheet 6

Developing/revising position descriptions

Position descriptions should be developed or revised each time a position becomes vacant or a new one is created. This is due to the evolution of positions through organisational change.

The job analysis process should be used to inform the development/revision of the position description (refer to process flow diagram in *Information sheet 1: Job analysis*). As previously described, undertaking the job analysis determines the current tasks, capabilities, and key result areas that go to forming the position description.

Key considerations for the development of a position description are to:

- clearly outline the tasks required of the role as determined through the job analysis process;
- clearly outline the requisite capabilities as determined by the job analysis process;
- include key selection criteria (KSC) that measure the capabilities required for the role in clear and unambiguous language with no jargon;
- clearly state organisational values so candidates can self-assess their degree of fit with the organisation;
- state whether working with children checks or police checks are required for the role; and
- state the job outcomes/key result areas in the position description. By doing this applicants are made aware of the success measures for the role and therefore understand what measures they will be assessed against.

A sample position description is provided online at **www.dpcd.vic.gov.au/communitysector** as a downloadable template.

Best practice recruitment and selection

Stage 2 – Attraction

Victoria
The Place To Be

7 Information sheet 7

Factors for consideration in attraction

In developing your **attraction strategy**, the following questions should be asked and answered[5]:

Develop a good understanding of your target audience

– Who is the target audience?
– What non-financial benefits may appeal to your target audience?
– What are the key demographics of your target audience?
– What are the media use habits of your target audience?

Understand the current labour market

– Do you understand the general trends in supply and demand for the skills set you are recruiting for?
– How easy will it be to find candidates with the skills set in the current local, regional, national and international labour market?
– How strong is the demand for the skills set and/or the role you are recruiting for?
– What does the current labour market offer in terms of salary and/or benefits for the type of role you are recruiting for?
– What do long-term talent supply trends look like? Are the skills set or position you are recruiting for likely to get easier or harder to source?
– What is happening in the international environment that may be influencing shortages in the labour sector you are trying to reach?
– How closely does your job description match the profile of candidates available on the job market?

Tip: Understanding your current labour market will also help to inform how you undertake your recruitment selection process. In a tight labour market, for instance, a fair, transparent as well as speedy recruitment process is important.

Know your competition

– Are other organisations currently recruiting for or terminating employees for a similar role?
– How similar are other organisations' position descriptions (i.e. are you competing for the same talent)?
– Where are other organisations typically sourcing individuals of this profile?
– What salaries are other organisations offering for a similar role?

5 This information has been incorporated from the Recruiting Roundtable's research, *Breaking the Quality–Time Compromise*, 2005.

Market the role

- Have you undertaken a job analysis to identify the key requirements?
- Is the language you use in the advertisement relevant to your audience?
- What advertising/communication channels have you considered i.e. online, press, radio, TV, donors/members, organisational newsletters, and/or specialist magazines? Do they suit your target audience?

Market the organisation

- What benefits does your organisation offer? How will you sell these benefits in your attraction strategy?
- How will you advertise the role?

Monitor and review

- Do you keep a record of the recruiting methods used, the associated costs and the appointment of candidates that directly correlate with the recruiting methods used?
- Do you collect data on the recruiting methods you use to measure the return-on-investment in terms of number and quality of hires yielded relative to source investment?

Tip: Attraction methods for regional and rural recruitment will need to be different to those for metropolitan areas. It is important to ensure that you understand the particular factors facing regional and rural recruitment prior to advertising.

For more information on regional and rural recruitment go to **www.ssa.vic.gov.au/CA2571410025903D/WebObj/WFP_regional_final/$File/WFP_regional_final.pdf**

8 Information sheet 8

Guide to writing better advertising copy

The point of writing **good recruitment advertising copy** is to attract the right person for the job and to promote a strong positive image for your organisation.

Copywriting is not about being clever with words. It is about getting a message clear in your head and putting it across simply to your target audience.

Before you start writing

It is important to find out as much as you can about the role that is being advertised. *Information sheet 7: Factors for consideration in attraction* provides guidance on areas that should be considered prior to writing an advertisement.

One main selling point or employment value proposition

Always remember that while you may know the benefits of the role, your target audience may not.

Therefore be clear and succinct in your selling point. There may be various selling points to the role, however, focus on the *main* selling point. This selling point can be used as a main point for the advertisement headline or sub-headline.

Writing your advertisement

When starting to write the advertisement it helps to:

– think about the job and the kind of person you would like to apply;
– put yourself in your target audiences' position;
– think about the elements that will attract your target audience;
– keep the text short, simple and informal in your advertisement;
– use short paragraphs to give added impact. Short sentences make it easier for your reader to understand your message;
– avoid using bullet points. They take up a lot of space and they are not very friendly to read. If you've got a list of points to get across, link them in a sentence, or a number of sentences;
– think about the tone of voice you are using. Think of your advertisement as a conversation between you and your ideal applicant;
– keep it informal. Use 'you' rather than 'the applicant' or 'the candidate'; and
– try to avoid using clichés.

When you have to write an advertisement in a hurry

For those times when you are stretched for time, here is a quick checklist you can follow to make sure your advertisement covers the basics:

- Who is your target audience?
- Do you really know what motivates them and why they will want to apply for this job?
- What is your main message in the advertisement?
- What are the most important details about the role (e.g. organisation details, location of role, qualifications, skills and benefits)?
- Have you verbally communicated the vacancy? (Telling a friend or colleague about the role may help you write your advertisement.)
- Is the text in your advertisement short, simple and informal?

Best practice recruitment and selection

Stage 3 – Recruitment and selection

9 Information sheet 9

Using a standard application form for short-listing

Short-listing is used to reduce the number of applicants for a vacant position into a smaller, more manageable pool.

Using a standard application form allows for an equitable short-listing of applicants (i.e. comparison of applicants is based on content of their application). The use of a standard application form provides a more transparent and objective approach to recruitment than traditional résumé screening as it reduces the risk of assessing applicants on non-job relevant criteria e.g. résumé style/presentation.

Question design

Questions contained in the application form should be:
– fair and unbiased;
– observe equal opportunity laws by not containing potentially discriminatory questions, such as the candidate's gender, and date of birth. Further information can be found at: **www.humanrightscommission.vic.gov.au/pdf/recruitment%20guidelines.pdf**; and
– related to job success.

Suggested areas to include in the application form which will assist in short-listing are:
– *education*: qualifications obtained;
– *employment/work experience*: with sections to outline previous position title, responsibilities and achievements in job roles;
– *competency based questions*: questions requiring candidates to demonstrate how they meet the key selection criteria (KSC); and
– *referee details*: ideally these should be work-related referees who in some way managed the individual (i.e. not a peer).

Tip: Ideally short-listing should be undertaken by the same panel members who are interviewing for the vacant position.

A ranking method can be used to assist in short-listing. This is where each KSC for the vacant position is given a weighting (refer to *Information Sheet 11: How to use a descriptively anchored rating scale*) and each application is scored against the weighted KSC.

Other methods for short-listing are:
– interviews (telephone or in-person); and
– psychological testing (in conjunction with another method). This method is used often for large numbers of applications.

10

Information sheet 10

Preparing for interviews

Interviewing is the most commonly used selection technique. It can be expensive, time consuming and most organisations do not maximise its value. However, if used appropriately, interviewing can be a good predictor of work performance. Ideally, interviews are conducted by a panel of people.

People involved in the interviews

The hiring line manager should form part of the interview panel as they:
– will have an in-depth knowledge of the job; and
– are well placed to identify high calibre applicants due to their level of involvement in the job analysis process.

All interviewers should be appropriately skilled/experienced in interviewing techniques and understand their roles and responsibilities in the process. Any training prior to the interview should:
– specify how to conduct a structured, behaviourally-oriented interview, how to provide effective feedback, instructions on note taking, how to avoid interviewer bias and how to select applicants based on merit; and
– be conducted regularly to update/refresh interviewers on interviewing skills.

The interviewing panel should be diverse e.g. including male and female interviewees. It may also be beneficial to include interviewers who do not belong to the organisation, but with knowledge of the organisation, in order to reduce the possibility of bias in assessment.

Preparing questions and conducting interviews

Interview questions should be behaviourally-oriented and based on each of the critical key selection criteria (KSC), as determined through the job analysis process.

Behaviourally-oriented interview questions are recommended (e.g. asking an applicant what they would do if presented with a particular situation) as past behaviour is the best predictor of future performance.

Tip: Avoid asking questions of a discriminatory nature for example, about pregnancy, parental or carer responsibilities, or age. For further information refer to: **www.humanrightscommission.vic.gov.au/pdf/recruitment%20 guidelines.pdf**

KSC should be used to develop appropriate **behaviourally-oriented interview questions**. The aim of behaviourally-oriented questions is for the applicant to *demonstrate* through past behaviour that they have the required KSC.

Requisite knowledge, skills, and attributes (KSA) are turned into a KSC by making them behaviourally based. For example, if the job analysis process determines that experience recruiting volunteers is a key requirement of the role, then this can be turned into a behaviourally based KSC by adding ‘please give an example’ in front of the requirement i.e. ‘Please give an example of a time when you recruited volunteers. What means did you use to ensure they had the capacity to undertake the task?’.

This KSC can then be used as a behavioural interview question. For example:

– if 'knowledge of recruitment practices' is deemed critical to perform effectively in the role, a behavioural interview question developed to support this could be as follows: 'Please describe a time when you had to manage a campaign involving the recruitment of various roles. What was the situation, what did you do and what was the result?'

Interviewers should note applicant responses in the following areas:

– Situation
– Task
– Action
– Result.

Further examples of behaviourally-oriented questions that encourage STAR-based responses include:

STAR	Example questions
Situation or Task	– Describe a situation when... – Why did you ...? – What were the circumstances surrounding ...?
Action	– Exactly what did you do? – Describe specifically how you did that. – Describe your specific role in the project. – Walk me through the steps you took.
Result	– What was the result? – How did that work out? – What problems/success resulted from ...? – What feedback did you receive?

Scoring interviews

Interviewers should assess applicant responses using a descriptively anchored rating scale (DARS). A descriptively anchored rating scale uses descriptors to help define the numerical ratings (refer to *Information sheet 11: How to use a descriptively anchored rating scale* for more information).

11 Information sheet 11

How to use a descriptively anchored rating scale

The use of a **descriptively anchored rating scale** is considered best practice as it provides a greater level of rigour to the assessment process by helping align interviewers' scores and removing some of the subjectivity of rating.

These rating scales use a description of the KSC to correspond with a numerical rating. They should be developed for each interview question to assist interviewers in rating interviewee responses.

When this rating scale is used, the level of reliability between raters increases. This in turn increases the validity of the selection technique (i.e. there is a better alignment between ratings given by interviewers).

An example of a descriptively anchored rating scale is as follows:

1 = much less than acceptable. Applicant did not at all demonstrate how they *[insert KSC being measured]*

2 = less than acceptable. Applicant insufficiently demonstrated how they *[insert KSC being measured]*

3 = acceptable. Applicant demonstrated sufficient evidence of how they *[insert KSC being measured]*

4 = more than acceptable. Applicant demonstrated detailed evidence of how they *[insert KSC being measured]*

5 = much more than acceptable. Applicant significantly demonstrated in great detail how they *[insert KSC being measured]*

Information sheet 12

Assessment techniques

The use of **additional assessment techniques** significantly enhances the selection process and increases the likelihood of a successful hire.

The following section provides an overview of what additional assessment can be used and in which setting. An overview of 'why, what, who and how' each additional assessment technique may be best employed appears below[6].

Tip: Research shows that work related assessment tests are received well. However, the use of additional assessments should be balanced against factors such as the cost of the assessment, benefits of using the assessment and labour market forces (i.e. in a tight labour market additional assessments may prevent candidates applying).

Tip: When testing for skills, ensure any particular needs of applicants (e.g. language needs or disabilities), are taken into account and flexibly applied[7].

Psychometric assessment

Psychometric assessment is widely considered an important component of best practice. The type of tests typically used for selection purposes are personality, cognitive ability, work styles and motivation. Research indicates that combining cognitive ability tests with a personality test measuring conscientiousness will provide a better prediction of work performance than cognitive ability alone.

All psychometric assessments need to be administered and interpreted by a qualified professional (i.e. a psychologist, and an accredited human resources professional), however the following information provides an indication as to what assessments are available.

6 Note that following a merit based process is still possible whether additional assessment techniques are used or not.

7 Public Sector Standards Commissioner, *Guidelines: Equal Employment Opportunity*, 2006, available at www.ssa.vic.gov.au.

Cognitive ability

Why

Research indicates that cognitive ability or general mental ability is well-established as the most important predictor of work performance. Testing for cognitive ability is important because it has a direct effect on job knowledge acquisition – individuals who have higher cognitive ability acquire more job knowledge, are able to acquire it faster and are able to compute complex information quickly and accurately.

What

Generally, the recommended cognitive ability tests are those that test for numerical and verbal reasoning. These tests should have been peer reviewed (i.e. tested by other researchers in the field).

The Australian Council for Educational Research publishes tests which have been peer reviewed and are available to most human resources professionals.

Who

Cognitive ability may be assessed for roles at any level. The use of appropriate norm groups will help assess the aptitude of an applicant in relation to similar others (i.e. scores for an individual applying for an administrative role should be compared against an ‘administration’ norm group).

For higher level roles, more difficult tests can be used. For lower level roles, easier tests can be used.

How

Cognitive ability results can be interpreted by someone with relevant qualifications. Many psychological/HR consulting firms have access to cognitive ability instruments and can administer and interpret the results for you. Alternatively, organisations may consider accrediting suitable internal staff in certain instruments to build internal capabilities in this area. It is not recommended, however, that an individual without appropriate qualifications/accreditation administer these tests or interprets results.

Personality assessment

Why

Personality assessment provides insight into an applicant's personal style i.e. how conscientious they are, how well they cope with stress, how they cope with frustration and anger, etc.

What

A highly recommended personality assessment is the NEO PI-R. This inventory is based on a 5-factor model of personality and is the most widely validated personality instrument. There is considerable research evidence that suggests that the 5-factor model of personality is a strong predictor of performance on the job[8].

Who

Applicants' personality should be assessed for roles at any level. It can be an important assessment for applicants who may move into, or are already in, positions of leadership and management. This is due to the unique insight it provides into how a person is likely to lead others.

How

Personality inventories can only be interpreted by qualified/accredited individuals. Many psychological/HR consulting firms have access to instruments such as the NEO PI-R and can administer and interpret the profile for you. The NEO PI-R in particular should be interpreted by a psychologist; however, there are other personality instruments that non-psychologists can obtain accreditation in. Suitable individuals may be eligible for accreditation, which would create internal capabilities in this area.

8 For example: Costa, P.T.Jr. Work and Personality: Use of the NEO-PI-R in Industrial/Organisational Psychology. *Applied Psychology: An International Review*. Vol 45(3) Jul 1996, 225-241; Piedmont, R.L. & Weinstein, H.P. Predicting Supervisor Ratings of Job Performance Using the NEO Personality Inventory. *Journal of Psychology: Interdisciplinary and Applied*. Vol 128(3) May 1994, 255-265; Barrick, M.R & Mount, M.K. The Big Five Personality Dimensions and Job Performance: a Meta-Analysis. *Personnel Psychology*. Vol 44(1) Spr 1991, 1-26; Detrick, P. et al. Validity Study: Relationship Between Personality and Academy Performance. *Applied H.R.M. Research*. Vol 10(1) 2005, 99-102.

Work sample and job knowledge assessment

Why

Work sample tests and job knowledge tests can be used to ascertain specific skill levels required before beginning a position (i.e. skills that cannot be learnt on the job). These two types of tests are quite similar in nature. Job knowledge tests measure critical knowledge areas needed to perform a job effectively and are generally used to assess specific skill sets i.e. technical skills such as IT programming. Work sample tests assess the actual execution of the critical knowledge i.e. they are practically based rather than knowledge based.

What

Given the work sample or job knowledge test is unique to the role, there is generally no 'off-the-shelf' solution. Tests of this nature need to be specially developed. Ideally, these tests should be developed by an organisational psychologist, and administered and scored by trained human resources specialists. Scoring work sample tests involves trained experts observing and rating behaviour, whereas job knowledge tests are written tests that have right/wrong response options.

Who

These tests may be used for technically oriented roles where specialist skills are required prior to entry into the role.

How

A trained specialist who scores the test or observed behaviour should be the one to interpret the results. Written results can then be provided to the hiring line manager.

Best practice recruitment and selection

Stage 4 – Induction/ Orientation/Evaluation

Victoria
The Place To Be

13 Information sheet 13

Reference checking

Reference checking is an essential part of the recruitment process and occurs to confirm information the candidate has included in the application.

Professional referees should be provided by the applicant at the request of the recruiter and it is preferable that these referees managed the candidate. Where an applicant is not able to provide professional referees and is not able to provide a legitimate reason, it is advisable to explore why.

Questions used in reference checking should be scored using a standardised questionnaire using a descriptively anchored rating scale (for example 1-5 with each measure containing a descriptor explaining what the measure means) in order to reduce the risk of non-evidence based assessments. An example of such a scale is provided in *Information sheet 11: How to use a descriptively anchored rating scale*.

Some areas that should be covered in the reference check are employment dates, confirmation of a candidate's claims in their application, estimates of an applicant's job performance capability and the former employer's willingness to re-hire the applicant.

Similarly to the interview, it is advisable to use a combination of open and closed questions when conducting reference checks.

Conducting any necessary checks, such as police checks or working with children checks, should also occur at this stage. Organisational policy should cover whether this is a requirement.

14 Information sheet 14

Structured induction/orientation process

Induction should be a structured process for all new starters. It is the first step in building a relationship between the organisation and the employee. Research outlines that the transition to the new workplace is made easier and more effective, for both the new starter and the employer, if there is an effective induction/orientation process.

The potential benefits of a structured induction process are:
– alignment of new starters with the organisation's mission, vision, and values;
– an improved understanding of the organisation and where new starters fit into the organisation's plans and goals; and
– retention of staff.

Induction content

Content of the induction process should cover both administrative and tactical issues, such as:
– organisational vision, mission and values should be communicated;
– organisational business plan should be communicated;
– learning and development and performance management programs should be communicated; and
– administrative forms (such as payroll information) which should be distributed and completed prior to the new starter's orientation.

Common mistakes

In designing the induction process, research[9] indicates the following are common and costly mistakes:
– trying to fill up 20 hours of information into four hours of orientation;
– running an unstructured induction believing that doing so has no negative impact;
– providing the new employee with a range of publications but no explanation as to why they may find them helpful;
– making new starter orientations boring; and
– introducing new employees into the organisation without appropriate support and coaching.

A sample induction checklist that may be considered in preparing an induction process for new starters is online at **www.dpcd.vic.gov.au/communitysector**.

9 Lee, D. *How to Avoid the Four Deadliest Onboarding Mistakes. And Why You Need to Get Onboarding Right*, 22 November 2005 (available at: www.ere.net/articles/db/3F9DEDC4BD074E23A72AD98B938382CA.asp).

15

Information sheet 15

The buddy system

The **buddy system** is designed to support and provide new starters with guidance and information to assist their transition into their new role. It is also an opportunity for the assigned buddy to directly (and positively) affect the experience new starters have with organisation.

The potential benefits of the buddy system are:
– faster integration of new starters into the organisation's culture and processes
– increased employee satisfaction and morale.

Buddy relationship

The assigned buddy should be from the same peer group level as the new starter and have enough organisational experience to competently assist the new starter in the initial phase of their employment.

Important aspects of the buddy's relationship with the new starter include:
– confidentiality and trust;
– the development of rapport and respect;
– continuous interest in and communication with the new starter;
– accessibility of the buddy to the new starter;
– sharing knowledge and experience; and
– ensuring that the new starter is working effectively and achieving the goals of the business.

The relationship of a buddy is ongoing. It is expected that, within the first month of commencement of employment, the reliance on the buddy relationship will be stronger.

However, as the new starter becomes more familiar and confident within the workplace, the buddy's responsibilities will become less evident.

Buddy responsibilities

The following are suggested guidelines and expectations of the assigned buddy for the first three months of the new starter's employment.

Prior to commencement

- call the new starter to welcome them to the team; check if they have any questions before they commence;
- organise a catch up for the new starter's first day in the organisation and invite other team members; and
- ensure you have time put aside in your diary (in line with the new starter's schedule) to dedicate to your buddy.

First day

- be available to greet the new starter following their induction (if attending) or first thing in the morning;
- organise a catch up with team members on their first day in the organisation;
- introduce new starter to key contacts/team members;
- provide guidance on completing first common system requirements; and
- refer new starter to the online induction material (if available).

First month

- continue to introduce the new starter to members of the wider organisation and be available to assist them in settling in;
- ensure the new starter is invited to specific meetings with the organisational support staff;
- where possible, provide on-the-job training on organisational processes, procedures and policies; and
- provide assistance with business tools that the organisation may use.

First three months

- continue to provide support and assistance as required; and
- where possible, continue to provide on-the-job training on the organisation's processes, procedures and policies.

16 Information sheet 16

Managing job expectations

Managing new starter expectations is critical to enhancing the success of an applicant's placement in the organisation. Assessing and understanding whether employees are culturally, intellectually and emotionally aligned with the organisation provides a stronger connection between the employer and employee.

A psychological contract is the degree of alignment between the communicated role requirements and expectations with the reality of what is actually experienced. Where misalignment of expectation and reality is high, an increased likelihood of resignation exists.

The potential benefits of managing new starter expectations and reality are:
– reduced risk of resignations
– improved workplace productivity and morale.

Confidential communication

To align new starter expectations with reality, a formal feedback process should be obtained from new starters after a specified period of time in the new role.

Feedback should:
– be collected by an external, independent person
– be treated confidentially.

Any individual information provided to the organisation by the third party must be authorised by the new starter on a signed consent form.

Feedback focus

The feedback sought should focus on:
– understanding what initial promises or statements were made during the selection process that led to developing the new starter's particular expectations
– obtaining the new starter's perception on:
  • their ability to realise the promises that were made to them
  • career opportunities within the organisation
  • values that are important to the organisation.

17

Information sheet 17

Probation periods

The **probation period** is critical to ensuring the role and organisation is right for the new starter.

It provides an opportunity for the new starter to understand and appreciate job requirements and expected work standards, their fit with the organisation, and for the employer to address any issues during the probation period.

The potential benefits of actively managing probation periods are savings in resources otherwise required for supervision, counselling, training and management of underperforming people.

It is recommended that meetings are scheduled with the new employee at regular intervals leading up to the conclusion of the probation period. These meetings should be used to assess how the new employee is performing and coping with the role. These provide an opportunity to clarify responsibilities and tasks and make sure that any support required is offered.

Factors to consider for probation periods include:

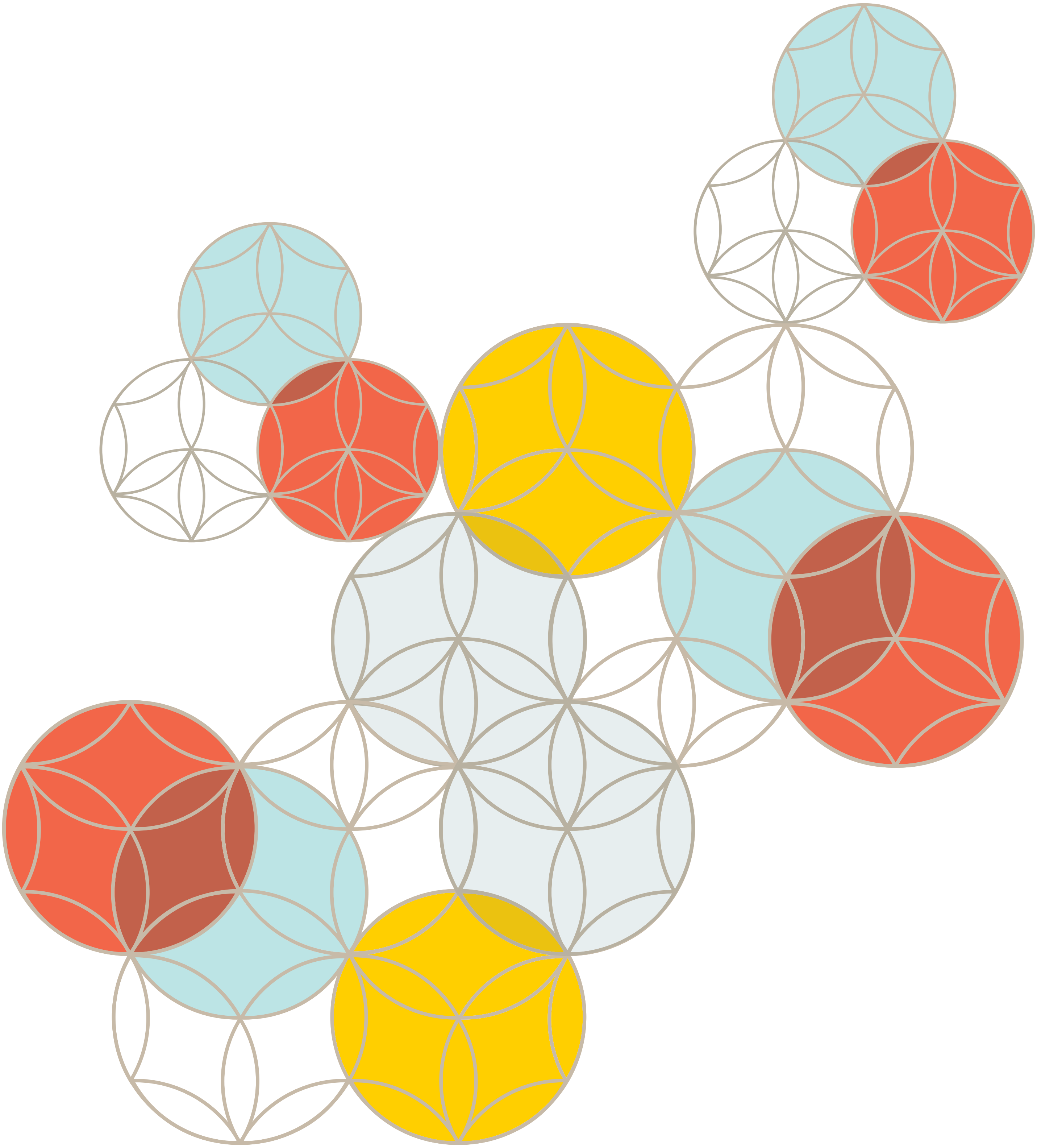
– when planning the job and undertaking the job analysis:
  - think about the application of probation periods, considering the nature of the job
  - advise applicants that probation periods will apply and the estimated duration during the recruitment process.

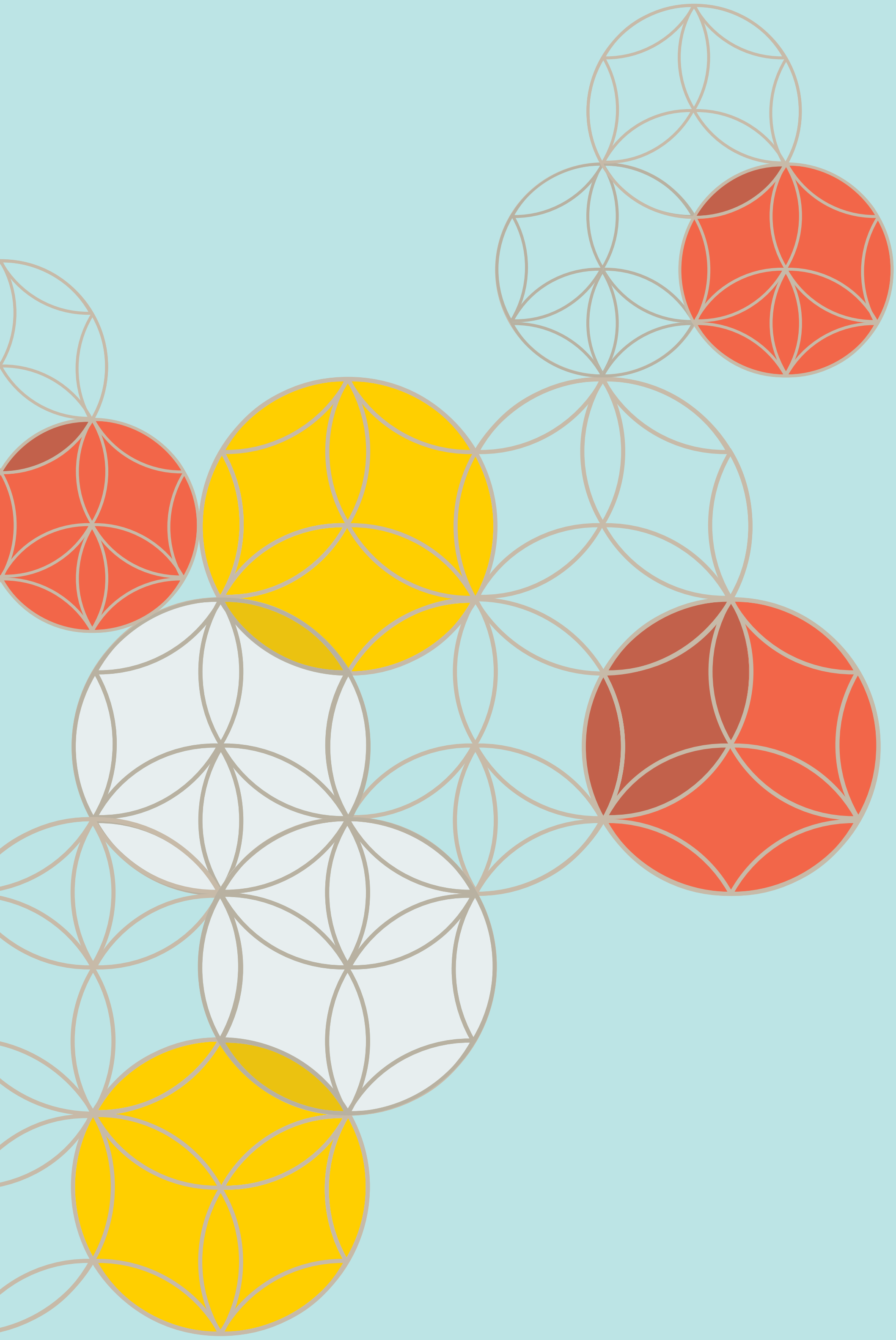
– once the selection decision is made:
  - set the probation period, reflecting on the successful new starter's experience, expertise, and so on.

– on job commencement:
  - discuss the probation period with the new starter, including intent and structure.

– during the probation period:
  - regularly monitor the new starter's performance and be clear about who is responsible for monitoring (typically, the hiring line manager is responsible for monitoring probations and confirming the appointment of employees)
  - meet with the new starter regularly regarding performance and probation.

– at the end of probation period:
  - complete probation report
  - notify the new starter and human resources of the probation decision (i.e. confirm appointment, extend probation or annul employment).





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