**How to decide who to interview?**

# Longlisting

Depending on how you have structured the selection process you will most likely start with a longlist of applicants. These applicants will, on paper, meet the essential criteria outlined in the person specification but you may require further opportunities to determine whether they truly meet all the essential criteria. This is because not all essential criteria can be assessed from an application or in an interview situation, especially for some practical/technical roles where some essential skills will only be evident from a practical assessment.

It can also be helpful to create a longlist before coming to a final shortlist for interview if a high number of applicants meet the essential criteria on paper and you don’t feel able to select purely on this basis. For example, some companies use numerical and verbal reasoning tests following an initial longlist and candidates are only invited to interview if they meet the benchmark in these areas.

# Testing

If pre-selection tests form part of your process, this should have been planned at the start of the recruitment process, so that candidates are expecting it and are not deterred from continuing with their application. Pre-selection tests can include online psychometric tests looking at personality profile, management capability or verbal or numerical reasoning.

Before using any pre-selection tests, you should confirm:

* Whether testing is appropriate for the role: refer to the job description and consider the use of testing in relation to the requirements of the role. For example, if numeracy is essential for a role such as an accountancy role, then a numerical reasoning test would be appropriate. For a role where there is no requirement to work with numbers it may not be appropriate to deselect candidates based on their numerical aptitude.
* Relevance of a particular test to the role: speak to the provider to determine where the test has been used in the past for roles of this sort and what the results have been. The nature and level of the role should also be considered.
* Your policy on giving feedback on test results and who will give it.
* Where results will be stored and for how long.

Cost implications.

Only ask candidates who meet the essential criteria to go through the pre-selection testing process – pre-selection tests should not be used to make decisions on candidates you are not sure about.

When inviting candidates to undertake pre-selection testing, always explain how this fits in with the overall process and the next steps.

# Shortlisting

Who should be involved?

Who participates in shortlisting depends on your organisation’s policy on recruitment, and on the role being recruited for. Some organisations have procedures which specify who should be involved, depending on the level and nature of the role. Generally, the line manager recruiting for the role should be involved. HR are usually involved at this stage to manage the process and to bring experience of recruitment and selection across the organisation. HR can also provide support in coaching line managers through the various stages of recruitment and to ensure fairness and equity. It is vital to ensure that no discriminatory practice takes place, and the best candidates are progressed.

If the role is a very technical one, a technical expert may be involved at this stage.

Ideally, all those involved in the interview process should be involved at the shortlisting stage. If this is not feasible it is important that others involved at the next stage accept the decision of the shortlisting panel.

Where you have used a recruitment agency to assist you with your recruitment, they will often provide you with a shortlist of applicants recommended for interview. It is still important for you as the employing organisation to review applicants put forward against your criteria to determine whether they should be called for interview. Applicants put forward by recruitment agencies should be considered at the same time and in the same way as internal applicants and applicants who have applied directly.

What information should the shortlisting panel see?

* All formal applicants for the role, i.e., those who have formally applied, not individuals who may have enquired or expressed an interest.
* CVs or application forms completed at this stage.
* Answers to any screening questions asked at the application stage.
* Other information provided by the applicant, whether or not you have requested it, for example, a covering letter or portfolio of evidence.

# Internal applicants

Internal applicants should be treated in the same way as external applicants; you should review their application against the same criteria and in the same way as external applicants and not make assumptions about what you know about the candidate in advance.

# Informing unsuccessful applicants

Once you have shortlisted for interview it is important to let unsuccessful applicants know as soon as possible. Do not wait until the end of the process just in case you don’t make an appointment. If you have completed the shortlisting process effectively it will be clear that these candidates do not meet the criteria. You may wish to use the template letters included here to inform an unsuccessful applicant that you will not be proceeding any further with their application.

It would be nice to be able to give feedback to every applicant but if you have received a high number of applications, it is not always going to be practical. However, if an applicant asks for feedback, you should always be prepared to give this, as it is good practice for a number of reasons. The candidate has taken the time to apply to the organisation and is interested enough to request feedback and although not successful this time may be ideal for a future vacancy. It reflects well on your organisation to give feedback in terms of your reputation as an employer of choice and to avoid claims for discrimination.

Under the Data Protection Act 1998 applicants can request copies of any notes made about them during the recruitment process. Ensure feedback focuses on the criteria you used to make your decision and covers areas where you felt the candidate did demonstrate evidence against the criteria as well as where they did not, or you could not find evidence in their application. Make the feedback specific to the candidate rather than general and ensure you thank them for their interest in the role and the organisation.