

Interview, Selection and Offer Management Best Practice Guide



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1. Longlisting and Shortlisting

1.1 Why do I need to complete longlists and shortlists?

Where you have received a large number of applicants for a role, it will be important to have an effective evaluative process, by which you can decide which candidates to see for interview. This is important because:

- You will want to create a demonstrably fair selection process, whereby you can justify
 decisions to see candidates for interview and more importantly, feedback to those who
 were not selected if requested to do so.
- You need to ensure you have the best possible chance of filling the role with an individual who is competent as per the person specification and therefore it is important to have a structure which informs your decision-making

1.2 What is the difference between a longlist and a shortlist?

In a large group of candidates, a longlist is used to score each candidate against each of the selection criteria to identify a ranking order in terms of which candidates meet which criteria and to what extent. This process can be used to eliminate candidates from the process who do not meet selection criteria. A shortlist, uses the information produced in the longlisting process to identify which candidates scored highest in the longlisting process and should therefore be selected to be progressed to interview.

1.3 How should I approach longlisting?

You may want to use our standardised longlisting form (see toolkit doc 2.1) to identify, in the case of each candidate's application, how well they meet each of the criteria in the person specification, that have been identified as criteria to be evaluated at application stage (as opposed to interview stage). This is best approached by printing out and reviewing each application and then using the form to assess how much evidence each candidate has provided for each criteria. As this evaluative process can be subjective, it is advised that in the interests of fairness, a minimum of two separate individuals complete a longlisting process for a group of candidates. As this can be resource intensive, you may wish HIN to complete a comparative longlist or indeed, the full longlisting process for you. Once you have evaluated how well each candidate meets each criterion (2 separate evaluations for each candidate) you will then be ready to complete shortlisting.

1.4 How should I approach shortlisting?

Prior to completing the shortlisting process, you will need to decide how many candidates you would like to see for interview. It is recommended, that you aim to identify, where possible, a minimum of three candidates per role to be progressed to the interview / assessment centre stage. Once you have decided how many candidates you would like to see, you will need to compare the two sets of data from the longlisting process to identify a rank order for candidates. Whilst there are various ways of establishing this order, a popular method is outlined below.

- Firstly, agree a standardised score for the extent to which each candidate meets each criterion. E.g.:
 - Criteria Fully Met= 3 points
 - Criteria Partially Met= 2 points



- Criteria Not Met= 0 points
- Once you have decided the above, work through each set of longlisting data for each candidate and add up their total score across the two shortlisters for all criteria e.g.

Total score from first longlister + Total score from second longlister = Composite Longlisting Score

• Once you have a Composite Longlisting Score for each candidate, order these from highest to lowest, to identify the highest ranked candidates for interview.

1.5 What if two or more of my candidates have the same shortlisting score?

In cases where two or more candidates have the same score, it is advisable to either:

- Consider interviewing both (they may be very evenly matched on paper)
- Use a third party to review the applicants in question and make a final decision
- Arrange for both of the original longlisters to meet to review the applicants in question and make a final decision. It may be that some of the criteria in the person specification are more important to the role than others and therefore, that candidates should be compared again against these specific criteria

Once the above process is successfully completed, you should have a list of candidates to invite to interview. You may also want to keep two to three candidates in reserve in case any of your shortlisted candidates withdraw from the process.

1.6 Best Practice on Reserve Lists:

Where you are keeping candidates on a reserve list you may either wish to:

- With-hold contacting reserve list candidates until all shortlisted candidates have confirmed interview attendance
- Contact reserve list candidates to inform them that they have not been shortlisted for interview at this stage but that owing to their score during the shortlisting process, they are being held on a reserve list, should other higher scoring candidates withdraw from the process



2. Designing Selection Format

2.1 What is selection format?

The term selection format is used here to describe the process by which shortlisted candidates are then evaluated in order for a decision to be made about who to appoint. According to the requirements of the post, this could include any or all of the following:

- Interview Process
- Assessment Centre
- Ability testing or other types of testing (as part of an assessment centre or separately)
- Presentation (as part of the interview process)

2.2 Which type of selection format will be most appropriate for the internship role?

In terms of best practice, an effective selection process provides:

- a) A strong indicator of the abilities and potential of the shortlisted candidates to meet the criteria set out in the person specification for the role
- b) The opportunity for all candidates to be assessed in a fair and appropriate manner for the role concerned
- c) The ability to accommodate reasonable adjustments according to individual candidate needs as per the Equality Act 2010:

http://www.equalityhumanrights.com/sites/default/files/uploads/documents/Old Guidance/PDFS/ Employers/1 employers recruitment.pdf

All three of the above considerations are now discussed below.

A) Establishing level of ability and potential to meet the selection criteria

In the case of each of the selection criteria on the person specification, it will be important to establish whether the criterion is either:

- Already fully established via the paper-based applications (e.g. stated qualifications, which
 can be backed up with certificates at offer stage).
- Not fully established via the application form but able to be established via interview, testing
 or other assessment method (e.g. communication skills- an applicant may provide an
 example via the application form but this is limited and the recruiter may want to test how
 well the candidate can apply this during an interview or assessment centre process)

From the above, the hiring manager will be able to establish which criteria they are intending to assess in the rest of the selection process. For each criteria to be assessed it will then be important to identify the most appropriate selection method for assessing this. The table below includes a list



of selection methods and suggestions as to the types of typical selection criteria they are most and least effective for assessing.

B: The opportunity for all candidates to be assessed in a fair and appropriate manner for the role concerned

In terms of best practice in relation to assessing candidates in a fair and appropriate manner, the selection process should be tangibly linked to the selection criteria / person specification. This allows candidates to prepare effectively and provides them with a clear understanding of why a particular selection method is being used. Linking the selection process to the person specification also gives recruiters a clear framework with which to score candidates and feed back to those who are unsuccessful at each stage of the process.

In accordance with the Equality Act (2010) selection processes should not take any of the following into account at any stage of the process (this includes advertising, application forms, interview, assessment and testing, offer management, referencing and on-boarding):

- Age
- Gender (other than as a GOR genuine occupational requirement)
 http://www.cipd.co.uk/pm/peoplemanagement/b/weblog/archive/2013/01/29/age-limits-can-be-justified-as-a-genuine-occupational-requirement-2010-01.aspx
- Religion or belief
- Sexual Orientation
- Disability (please see below section on reasonable adaptations to the recruitment process)
- Race
- Marital or civil partnership status
- Pregnancy or maternity
- Gender reassignment

Examples of indirect discrimination in recruitment practice:

- Requiring a UK-based qualification and not accepting an overseas equivalent (e.g. GCSEs)
- Requesting a particular number of years of experience may rule out younger people who
 have the skills required but have not had the opportunity to demonstrate them over an
 extended period. Unless there is an objectively justifiable reason it is, therefore, advisable to
 replace length of experience criteria with a requirement for proven skills in that area).
- Requiring a candidate to be a native-speaker of English (implying criteria around race), as
 opposed to requiring a candidate to have fluent English, which relates to ability rather than
 nationality.

C: The ability to accommodate reasonable adjustments according to individual candidate needs as per the Equality Act 2010

Many factors will be involved in deciding what adjustments to make to a selection process and they will depend on individual circumstances. Different candidates may need different adaptations, even if they appear to have similar disabilities.



The best starting point when making adjustments to the recruitment process is with the candidate themselves. Key questions could be:

Application Stage:

• Do you consider yourself to have a disability? (This question could be included as part of an Equal Opportunities Form- see toolkit doc 1.3)

Interview or Assessment Centre Stage:

- If you consider yourself to have a disability and will require any adjustments to be made as part of the selection process, please contact (named person) who will be able to discuss this with you and make arrangements accordingly. (As part of a letter or email inviting candidates to interview- see toolkit doc 2.4)
- Phone conversation following declaration of a disability at interview stage: Can you
 describe to me the type of adjustments that have been made in prior interview
 scenarios? OR Can you describe to me the type of support you feel would benefit
 you?

In addition to contacting the candidate, professional bodies such as non-profit organisations linked to supporting individuals with a particular disability or the referring university's employability or disability support services may be able to advise or provide expert assistance. This may be particularly useful where a candidate has not had prior experience of adjustments being made for them at interview. Adjustments should be made on a case by case basis and it should not be assumed that two candidates with the same disability will require the same adjustments.

HIN is able to provide advice and support on adaptations to interview processes for disabled candidates. Please contact the Internship Project Support Officer for further information.



TABLE 1- SELECTION METHODS- EFFECTIVENESS BY CRITERIA

SELECTION METHOD	TYPES OF CRITERIA WHICH CAN BE EFFECTIVELY ASSESSED	TYPES OF CRITERIA WHICH CANNOT TYPICALLY BE EFFECTIVELY ASSESSED
Biographical Interview Questions	Tangible skills and knowledge relating to qualifications, level of experience or exposure to a particular sector. Management skillset (exposure to only rather than application of it)	Transferable competencies such as communication skills or teamwork
Strength-based interview questions	Overall fit to team and role as well as departmental and organisational working approach. Priorities of an individual can be identified as can development areas. Examples should be requested to strengthen evidence base where possible.	Transferable competencies (if examples are not requested), qualifications and technical skills. Level of experience or exposure.
Motivational Interview Questions	Candidates' knowledge and understanding of the wider sector (e.g. healthcare/ NHS) or of the organisation specifically. Candidate commitment and interest level in the role. Development areas where the candidate is looking to gain skills or knowledge	Transferable competencies and tangible skills or qualifications.
Behavioural Interview Questions	Prior work or academic evidence supporting transferable competencies such as teamwork, communication skills, project management, organisational skills, leadership. From these examples, future likely workplace behaviour can be predicted/ ascertained.	Technical skills/ tangible skills e.g. programming, IT, languages, presentation skills, public speaking



SELECTION METHOD	TYPES OF CRITERIA WHICH CAN BE EFFECTIVELY ASSESSED	TYPES OF CRITERIA WHICH CANNOT TYPICALLY BE EFFECTIVELY ASSESSED
Situational Interview Questions	Future likely workplace behaviour in relation to transferable skills such as problem solving, teamwork, organisational skills, managing expectations.	Technical skills/ tangible skills e.g. programming, IT, languages, presentation skills, public speaking
Individual Presentation	Presentation skills, communication skills, PowerPoint, Prezzi, Sector or subject-specific knowledge, ability to adapt to situation and task	Some transferable skills such as teamwork, organisation. Technical skills relating to the role.
Group Presentation	Presentation skills, communication skills, PowerPoint, Prezzi, Sector or subject-specific knowledge, ability to adapt to situation and task. Teamwork, negotiation, leadership and management	Some transferable skills such as teamwork, organisation. Technical skills relating to the role
Other Group-work Exercise	Sector or subject-specific knowledge, ability to adapt to situation and task. Teamwork, negotiation, leadership and management. Time management and organisational skills. Interpersonal skills.	Technical skills and knowledge. Ability to work independently.
Ability Testing	Literacy, numeracy, abstract reasoning, logic and problemsolving	All other types of criteria
In-Tray Exercise	Prioritising and organisational skills. Logic and initiative	All other types of criteria
Case Study Exercise	Ability to work independently, logic and reasoning, literacy, written communication, interpretation and application of numerical data/ written information. Indication of individual priorities and comfort zones in the workplace.	All other types of criteria



SELECTION METHOD	TYPES OF CRITERIA WHICH CAN BE EFFECTIVELY ASSESSED	TYPES OF CRITERIA WHICH CANNOT TYPICALLY BE EFFECTIVELY ASSESSED
Situational Judgement Exercise	Future workplace behaviour in relation to transferable skills (e.g. prioritising, problem solving)	Tangible or technical skills, sector-based understanding, communication, leadership
Employee Networking Session	Communication skills, confidence levels, initiative, interpersonal skills.	Ability to work independently, organisational skills, technical skills for the role, written communication, logic and reasoning, problem-solving.



3. Designing Interview Questions

3.1 Practicalities

Best practice is to ensure that you have an agreed list of questions prior to interview, which should be agreed by all members of the panel, these should be arranged in a printed template (see toolkit doc 3.1) on which all panel members can make notes and score the candidate's answers in each case. It is helpful to make up a pack for each panel member, which should consist of:

- Schedule of attendees and interview times
- Applications/ CVs and Covering Letters for the candidates who are attending
- Interview Questionnaire sheet for each candidate (A sample interview questionnaire is provided in toolkit doc 3.1.)

HIN can assist in the drafting and design of questions for interview on request. Some key guidelines you may wish to follow, if you are drafting the questions yourself, are included below.

3.2 What can I assess via interview?

Using table 1 above, you will be able to identify which of the criteria from your person specification can be effectively assessed via interview, you should then list these criteria in order from most important to least important and aim to design between 7 and 10 questions, covering these criteria. Some questions may cover more than one criterion (for example a competency question focusing on effective communication may also be able to assess negotiation skills or leadership skills (depending on the wording)

3.3 How can I effectively assess candidates who are typically likely to have less workplace experience?

Again, if competency-based questions are worded appropriately, candidates can be encouraged to discuss non-work-related scenarios where they may have applied a similar skillset for example:

- Academic scenarios and examples from their time at university
- Scenarios from extra-curricular activities or volunteering

Examples:

Can you tell us about a time when you have worked effectively as part of a team to achieve a positive outcome?

Can you tell us about a time when you have put forward an idea or suggestion which was taken up or implemented? How did you approach this?



3.4 Types of Interview Questions:

Below, each of the types of interview questions listed in table 1 are explained, along with examples, showing what they assess and how.

Biographical Questions: These are often candidate specific, or focus on factual elements of a candidate's experience linked to their CV. They are sometimes unrelated to the person specification and should therefore be used in moderation. Some candidates may respond overly briefly to these types of questions and so how the question is phrased is key to eliciting the right level of detail. Examples:

- **X** Which areas of accounting did your course at university focus on?
- ✓ Can you tell me about your course at university? How did it help you develop your accounting skills?

Strengths-Based Interview Questions: Whereas competency-based interview questions (see below) are focus on finding out what a candidate is capable of and their working approach. Strengths-based interview questions take an interest in finding out what a candidate enjoys doing and how they view their strengths and development areas. They can be helpful in ascertaining whether the candidate's interests and career ambitions are aligned with the direction of travel for the role/ department. Examples:

- ✓ Can you tell me about a time when you achieved something you were really proud of?
- ✓ Which parts of your university course did you enjoy the most and why?
- **X** What are your strengths/ weaknesses? (too wide, may encourage the candidate to just make a list without explaining or give rise to an overly-scripted answer)

Motivational Interview Questions: These questions are helpful in gaining an insight into the level of commitment or interest a candidate has in relation to the job role and the organisation. If there are aspects of the person specification, which relate to a candidate showing a demonstrable interest in an area of work or the sector, these types of questions are well placed to assess this. Examples:

- ✓ Why are you interested in this job role and why do you want to work for us?
- ✓ What do you expect to be doing in the first 3 months of the role?
- ✓ Where do you see yourself in 5 years' time?
- **X** What do you know about us? (Only really tests knowledge of the organisation)
- ✓ Behavioural Interview Questions: Behavioural questions ask candidates to provide an example of a situation they have previously experienced, which demonstrates a particular competency from the person spec for the role. Such questions are particularly good for assessing how a candidate might apply their



skills to a workplace scenario, based on how they have approached a similar situation in the past. Examples:

- ✓ Can you tell us about a time when you have used your initiative to come up with an innovative solution to a problem?
- **X** Give me an example of a time when you used your initiative? (may provoke a non-specific response or a less well-developed answer)

Universities have become very aware of the use of behavioural interview questions in selection processes and students are often encouraged to use the CAR technique to structure responses. As an interviewer, the CAR checklist may also be helpful in understanding whether the candidate has provided a full response and evaluating the quality of it:

C= Context: Did the candidate briefly explain the background to the situation? E.g. Where/when did the situation come up? Why did it come up and what were their responsibilities in relation to it?

A=Actions: What did the candidate do to respond to the situation? How did they approach this? What was the rationale for their approach?

R= Result/ Reflection: What was the outcome following the above actions? Was there any learning that the candidate was able to take away from the situation?

Situational Interview Questions: These ask candidates to respond to a given hypothetical scenario that they might encounter in a typical working day in the role. They are not based on prior knowledge or experience and are therefore a great leveller in terms of comparing candidates with a range of different types of backgrounds and experiences. Candidates are less likely to prepare scripted answers or examples than with behavioural questions. Examples:

- ✓ How would you approach a situation where you were faced with multiple deadlines?
- ✓ How would you deal with a conflict or disagreement with a team member in the workplace?
- X How would you cope with tight deadlines? (Does not encourage a detailed answer)



4. At the Interview

4.1 Pre-Meeting

For a panel interview, it is typically appropriate to convene a pre-meeting 30mins before the start of the first interview to decide which panel-members will ask which questions. The chair of the panel will typically take responsibility for introductions and providing each candidate with an overview of the interview format at the start (prior to beginning the interview questions) and closing the discussion after each interview.

4.2 During Interview FAQ:

What should I do if a candidate is struggling to answer a question or has misunderstood it?

It may be appropriate to wait for a pause in their answer before answering a follow up question. For example:

- "I was particularly interested to hear how you approached those actions. Can you tell me a bit more about your working approach?"
- "In particular it would be interesting to hear more about....."

It may also be appropriate to re-phrase the original question or further explain the context if needed.

Should I provide a section at the end of the interview for candidates to ask any questions they have?

Yes this is always good practice and may identify further skills, interests or knowledge the candidate has not had an opportunity to address elsewhere in the interview.

If I want to ask the candidate an additional question about information in their application (i.e. a question that is not part of the planned interview format) when should I do this?

Typically, specific biographical interview questions should feature at the end of the interview when the candidate is more relaxed and is likely to be able to be in a better position to answer any queries

How can I reassure a candidate who is particularly affected by nerves?

Key interpersonal gestures such as shaking hands, positive body language and eye contact and thanking the candidate for coming in to see you can all be a very good starting point for this. Offering them a glass of water (in all cases) is also good practice.

For candidates who are stumbling over their words or who have frozen mid answer you may want to:



- Reassure them that their answer is good so far and tell them not to worry and take their time
- Ask them if they would like to come back to the question at the end of the interview

What are the key points I need to cover in closing the interview?

Make sure that you have provided them with an opportunity to ask any final questions they may have and that you have thanked them for their time and advised them of when they are likely to hear the outcome of their interview. It is also good practice ask them about their availability to start work, should they be offered the role.

Can I get any other help running my interview process?

HIN project team members can support, chair or participate in interview panels on request. Please contact the Internship Support Officer for further information.



5. Scoring Interview Questions

Please refer to toolkit document 3.1 (Interview Questionnaire template) for a suggested scoring schematic. Best practice suggests taking brief notes on the answers as the candidate moves through their questions and then scoring their answers at the end of their interview (but before you see the next candidate). In situations where the panel is split between candidates or where two or more candidates are judged appointable, scoring can be used to compare overall interview performance and inform the selection decision. It can also be used to inform any post-interview feedback that is being provided to unsuccessful (and indeed successful) candidates.

6. Post-interview review and deciding who to appoint

Appointment decision making can be a challenging process and the FAQ below are intended to inform best practice, rather than dictate what is required.

6.1 Does the panel need to make a decision straight away?

It may be that an interview panel have been working to a full-day recruitment schedule and it may not therefore be practical to convene the panel immediately following on from the final interview, due to time constraints and/or fatigue (which could lead to poor decision-making). If this is the case, an arrangement should be made for the panel members to meet as soon as is reasonably practicable (ideally the next day) to discuss the candidates and the recruitment decision. Candidates should have been made aware at the end of each interview, of the expected timescale for the recruitment decision-making process.

6.2 Should all panel members be present for the post-interview discussion and decision-making process?

Where practical, it should be possible for all panel members to contribute to post-interview discussions and feed in their views on candidate performance against the selection criteria. The chair of the panel should always be present to facilitate this discussion. In some cases, panel members may have been brought in from other departments or indeed, other organisations to sit on the panel and provide an objective or consultative viewpoint. In these cases, it may not always be possible for them to attend such discussions but it may be possible for them to provide a consolidated form of feedback over the phone or via email, which is then fed in to the discussion by the chair of the panel.

6.3 What about a situation where the panel don't need to discuss the recruitment decision because there is a clear front-runner in the selection process?

In a situation where all panel members are quickly in agreement as to which candidate(s) to appoint, it is important to confirm rationale, key points on which the decision is based and feedback for the other candidates. Important questions for the panel discussion might include:

- For each panel member, why is the front-running candidate the most suitable to appoint in terms of the person specification and working context of the role?
- What development areas does this candidate have?



- What feedback can be provided to the other candidates in terms of their interview performance? Where did they perform well against the person specification? What areas can be identified for improvement?
- For the candidate who is to be offered the role, what are the key next steps in terms of making the offer? Who will contact the candidate? What spine point within the pay banding for the role should the offer be made at?
- Are there other appointable candidates, who could be offered the role in the event that the first-choice candidate does not accept it?

6.4 What about a situation where there is no clear front-runner or the panel is split?

In situations where the panel is undecided or split, a more detailed discussion will be required. A suggested structure could be as follows:

The chair of the panel facilitates the discussion and asks all panel members to comment on:

Stage 1: Appointable or Not-Appointable

- > Overall view in the case of each candidate as to whether they are appointable or not appointable (with rationale)
- In cases where the appointability of a particular candidate splits the panel, it will be required that each panel member feeds in on the rationale for their viewpoint and the chair then makes a decision as to how this candidate is categorised
- All candidates attending interview are then classified as appointable or not appointable in each case.

Stage 2: Discussion of Appointable Candidates

- The chair then facilitates a discussion of each of the appointable candidates in turn to ascertain an overview of their strengths and development areas before presenting this back to other panel members, hopefully enabling a decision on who to appoint to be made (by the hiring manager in most cases)
- In cases where the panel are still undecided, scores for each candidate can be totalled by each panel member and the chair can then take an average of scores or grand total, to provide an understanding of the relative performance of each candidate. Ideally, this will then facilitate a recruitment decision.
- Feedback bullet points for other appointable candidates can then be agreed. It may be that this feedback is held in reserve until a recruitment decision has been made, allowing further offers to be made if the lead candidate does not accept their offer (see below section on offer management)

Stage 3: Discussion of Not-Appointable Candidates

 The chair then facilitates a discussion of each not-appointable candidate to ascertain, from each panel member, the key feedback points to be passed to the candidate in each case



7. Offer Management

Once a recruitment decision is made, it is advisable for offer management to be dealt with in stages. The panel must first decide:

- -Who will make the offer (typically the chair of the panel or the line-manager for the role)
- -How the offer will be made (typically over the phone with a formalised follow-up via email)
- -What offer is to be made (in terms of pay within the banding).

Stage 1: Conditional Offer to the Successful Candidate

Good practice dictates that:

- The candidate receiving the offer should be provided with the full details they need to make a decision whether to accept (including pay and location of the role)
- The offer should be made subject to satisfactory references, proof of right to work documentation being supplied, and any other pre-employment checks required at an organisational level. Some organisations prefer to collect right to work documentation at interview stage and so this may already have been covered, dependent on the process you wish to follow
- The candidate should be given the option to review the offer before making a decision (should they require this). If this is the case, a timescale agreeable to both the employer and the candidate should be put in place

Stage 2 a) First Choice Candidate Accepts the Offer

Refer to stage 3 below (feedback to unsuccessful candidates). For the candidate accepting the role, next steps around referencing, contracts and start dates should then be agreed and a formal, conditional job offer should be made in writing (see toolkit doc 4.1). The candidate should be advised to contact their referees to notify them of the impending reference requests in or to facilitate a quicker on-boarding process.

Stage 2 b) First Choice Candidate Rejects the Offer

Good practice dictates that:

- ➤ The employer making the offer may wish to obtain feedback from the candidate on their decision-making
- ➤ If candidate feedback relates to the salary offer and there is a possibility of negotiation, the employer may wish to consider whether flexibility is possible before feeding back to the candidate or making a follow-up offer
- The employer may wish to consider whether other candidates deemed appointable in the selection process should be offered the role and if so, stage 1 above should be repeated

Stage 3- Feedback to Unsuccessful Candidates

Good practice dictates that:



- All candidates who are not in receipt of a job offer following on from the interview process, should be informed of the recruitment decision as soon as is practicable following the recruitment process (see toolkit 4.2 for sample templates if communicating in writing)
- All candidates should be offered feedback on their interview process. If they take up this offer, feedback can be provided over the phone or in writing
- Feedback should relate interview performance to the criteria on the personspecification and should be specific where possible
- Feedback should provide positive points about interview performance as well as development areas
- For appointable candidates, the employer may wish to encourage future applications from the candidate or inform them about other roles they could be considered for

As with other stages of the process highlighted above, HIN are able to assist with offer management and the follow-up of references on request. Please contact the Internship Project Support Officer for further information.