Policy and Procedure

Shaftesbury Education

November 2025

# Recruitment and Selection (Education People Team) Policy and Procedure

| This document relates to | |
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| Shaftesbury Education | ✓ |



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# Introduction

## Purpose

It is Shaftesbury's aim to be the employer of choice in the charity, social care and education sectors. We seek to recruit and retain staff of the highest quality, who can contribute fully to the achievement of the charity's aims and achievements.

All individuals should be recruited solely based on their ability and in accordance with our equal opportunity policy.

We will ensure that all information provided by applicants will be treated as confidential and, if successful, their details will be stored and controlled in line with the requirements of the Data Protection Act 2018.

## Scope

This policy applies to all recruitment activity, including internal promotions and secondments, and including roles that are filled on a fixed-term contract.

## Procedure

Head of settings have oversight of all recruitment. They must ensure this is undertaken in a clear, consistent, and professional manner and in line with our equal opportunity policy. Selection will be conducted on an objective basis and will focus on the applicants' suitability for the job and their ability to fulfil the job requirements.

To ensure objectivity, the duties and the skills required of the post-holder will be reviewed and any existing documentation updated so candidates are assessed against the same framework. Person specifications will be carefully considered to minimise the risk of direct or indirect discrimination and to ensure they do not impose any condition or requirement which cannot be justified by the demands of the post, especially regarding qualifications and previous experience.

Shortlisting and interviews will, where possible, normally be conducted by two or more people to minimise the risk of inadvertent bias.

We use standard documents and forms for all recruitment and selection to ensure a professional and consistent approach. All candidates (including internal applicants) will be required to complete a standard application form to ensure better comparability of information.


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## Safer recruitment

- Safer recruitment is a set of practices to help make sure that all staff and volunteers are suitable to work with vulnerable adults, children, young people. It is a vital part of creating a safe and positive environment and making a commitment to keeping these groups safe from harm.
- Safer recruitment practices contribute to building trust among communities, staff, and stakeholders, ensuring that the individuals responsible for the care and education of vulnerable groups adhere to high ethical and professional standards.
- If a member of staff involved in the recruitment process has a close personal or family relationship with an applicant, they must declare this as soon as they become aware of the application and must withdraw from any involvement in the selection and decision-making process.
- We fully comply with the principles of safer recruitment. All roles will be subject to enhanced DBS checks and satisfactory references. The selection process will include elements that test applicants' suitability to work with vulnerable groups.

## Authorisation to recruit

All vacancies must be supported by an approved recruitment authorisation form, signed off by the relevant Executive Director or a member of the Executive Team.

Every recruitment authorisation form submitted should justify the requirement for the position. A job description must be attached to the form.

Before any authorisation is given, it is important to identify:

- whether, if this is not a new position, the workload can be absorbed into the current structure
- whether there are any internal candidates who could transfer or develop the necessary skills
- whether the role needs redefining
- whether the overall structure of the team, department or business needs reviewing
- whether needs have changed and the role will still meet business needs
- whether there is the need for temporary cover if there is a gap between the current job holder leaving and the appointment of the replacement.


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All recruitment costs that will apply to this position, such as relocation, recruitment, training, computer equipment, specific software and licences etc must be considered.

Each job description and person specification will outline the appropriate experience and qualifications required.

Recruitment will only commence once approval has been received.

Before filing a position, the Head of Setting should ensure the job description is up to date and the person specification accurately reflects the requirements of the job.

## Advertisements

We typically advertise our vacancies both externally and internally to attract a diverse pool of candidates that reflect the community Shaftesbury serves. To ensure the best candidate is attracted and appointed, we may use any or all of the following methods: online only adverts including job boards, press adverts or social media. Other forms of advertising may include:

- Indeed, Adzuna, Charity Jobs, and Glassdoor
- Specialised job sites, such as TES (for education roles)
- Local authority vacancy bulletins
- Colleges/university websites
- Job Centre Plus contacts
- Church networks
- printing and distributing flyers.

External recruitment advertising must reflect the requirements of the position and must be in line with our style and branding guidelines and portray a professional image. All external adverts will be designed by the Head of Setting in line with the guidelines from the Shaftesbury Communications Team. Sometimes additional specialist input may be required.

Costs and advice with respect to the best method for attracting applicants can be obtained from the Recruitment / Education People team.

Unless the role is exclusively offered as an internal opportunity, all vacancies will be advertised both internally and externally at the same time.

Advertisements must be clear and should briefly cover:

- the requirements of the job


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- the necessary and the desirable selection criteria
- a brief overview of our profile and culture, including being an equal opportunities employer
- the location
- the reward package
- how to apply
- whether any employment checks will be made with relevant bodies (such as the DBS, FCA credit reference agencies etc).

Employees will be informed of all external recruitment advertising and details of the positions and where they are being advertised, including which internet sites, will be placed on noticeboards and our intranet. Advertising costs will be charged to the Head of Setting's budget.

## Secondments

The Head of Setting may want to consider advertising the vacancy on a secondment basis rather than a permanent basis. A secondment is typically for no longer than six months. In this situation, the employee's substantive post will be retained for them at the end of the secondment.

If successful, the secondee can be appointed permanently to the role as a fair recruitment process would have taken place at the beginning.

## Agencies and consultancies

Where appropriate, the position may be placed with external providers, such as recruitment agencies or specialist select and search consultancies. Where these providers are used, they will be given a written brief, including the job description and/or person specification to ensure that the requirements are fully understood and candidates are suitably matched to these requirements.

Fees for using any agency or consultancy must be negotiated in advance and their terms of business received and agreed prior to authorising them to start the search. The cost of the agency fee if their candidate is successful will be charged to the Head of Setting's budget. If an agency fee is likely, it must be included in the Authorisation to Recruit and be pre-approved.

The Head of Setting must:


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- Ensure any recruitment agency appointed is aware of and committed to abiding by equality legislation.
- Ensure any recruitment agency appointed is aware of and committed to abiding by obligations under GDPR.

## Applications

To support our commitment to sustainability, applications are primarily accepted online. Paper-based applications will only be considered in exceptional circumstances. If a paper application is requested, the Recruitment/Education People team will review the need for this to ensure our processes remain environmentally responsible and accessible to all.

All applications will be treated confidentially and handled in accordance with our data protection policy.

Applications will be circulated only to those directly involved in the recruitment process.

## Internal applicants

We encourage internal applications to ensure employee progression and development. With very few exceptions, all vacancies will be advertised internally to ensure existing employees and agency workers are given the opportunity to apply and develop their skills and careers. This approach also gives us the following additional benefits: employees are made generally aware of career opportunities available to them; an internal candidate will already be familiar with our business, its policies, procedures, internal structure and systems; an internal candidate may be able to take up the post earlier than an external one and we save the cost and time involved in external recruitment.

However, vacancies will not be advertised internally where there is a reorganisation within a department and we have employees "at risk" of redundancy for whom we are seeking alternative posts, or where we have an obligation to place somebody in another post (such as an employee who needs to change shift pattern for health or safety reasons or an employee returning from maternity/adoption/shared parental leave whose original job is no longer available). In these instances, the needs of the employee to be redeployed will take priority.

To apply to internal roles, the employee will need to submit a covering letter meeting the requirement as specified in the advert and an application form. The employee must inform their current manager of their applicantion to the new role.

Employees are eligible to apply for any position that is advertised externally.


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## Disabled candidates

Shaftesbury is committed to the 'Disability Confident' scheme and will guarantee an interview to candidates who declare to be disabled and who meet the minimum essential criteria for the job.

At all stages of the recruitment process, reasonable attempts will be made to accommodate the needs of any candidate who has notified us of a disability. This may include changing the timing or location of any interview to enable the candidate to attend, providing information in different formats or larger type, etc.

## Shortlisting

The shortlisting process will include a review of each application against the requirements of the position.

A minimum of two people must be involved in shortlisting. Notes of decisions made must be kept and the shortlisting panel must be prepared to explain their reasons for not shortlisting a candidate.

A scoring system should be used which reflects the requirements of the role as set out within the job description and person specification.

Candidates who are not selected for the next stage of the selection process will be advised either by letter or email.

Internal applicants will be advised in person, with feedback as to why they have not been shortlisted.

## Selection methods

We may require candidates to undergo selection tests before, during or after any interview. Where this is appropriate, candidates will be informed prior to the test.

These additional tests may include presentations, report writing, skills or ability tests; or any other test that is deemed appropriate and relevant for the position.


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## Interviews

Shortlisted candidates will be invited to attend an interview, and will be provided with the relevant job description, together with location details, map/directions (where appropriate), and informed where to report and who to ask for.

Wherever possible, the interview panel will be diverse and balanced, with members representing different genders, ethnicities, and backgrounds.

We aim to give sufficient notice to candidates before the interview date to enable them to adequately prepare for this. However, in some circumstances due to time restraints and business needs, this might not always be possible.

If required, interviews may be conducted by a panel of at least two members of staff and will be chaired by a competent and trained manager. The chair of the interview panel will have ultimate responsibility for ensuring that a fair process is followed.

To protect us against claims of discrimination and ensure a fair process, a standard interview process and questions will be completed for each interview.

Questions will ask for information that will help us to assess the candidates' ability to do the job. Questions about marriage plans, family intentions, religious or political commitments (unless there is a Genuine Occupational Requirement that applies to the vacant role), caring responsibilities (unless such questions are directly relevant to assessing a candidate's experience of the duties of the particular vacancy), or about any other issues which may give rise to suspicions of unlawful discrimination should not be asked. Candidates will not be asked whether they plan to opt-out of auto-enrolment, nor will any statements be made (whether written or verbal) that either state or imply that the offer of a post could depend on whether they opt-out of an automatic enrolment pension scheme.

At each interview, the interviewers will be introduced and an outline of the structure of the interview given. Candidates will be encouraged to:

- take the time they need to think about responses to questions
- ask for clarification if any question is unclear
- give as many examples as they can to support their answers.

For certain positions, second interviews may be arranged.

We will ensure that the process is not unlawfully discriminatory and will attempt to accommodate the particular needs of any person with a disability.

Interviewers must keep records of their decision making and be prepared to give feedback to unsuccessful candidates.


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## Post interview

After each interview, we will review each candidate's interview performance, as well as the results of any additional selection tests undertaken.

Interviewers should aim to reach consensus on the decision as to which candidate(s) is/are successful. In exceptional cases where this is not possible, the chair of the interview panel will have ultimate responsibility for making the final decision.

All unsuccessful external candidates will be informed in writing. Internal applicants will be advised in person why they have not been selected and offered feedback at a mutually convenient time.

Where a candidate was not offered the position, but it was felt that they were able to perform the duties and scored well during the selection process, they may (subject to their prior agreement) be retained on a reserve list, and should a similar role come up within a period of six months they may be contacted and invited to an interview.

Where an employee has undergone a recruitment process to fill a temporary position and that position subsequently becomes available then we may, at our discretion, appoint that individual into the vacant position without the need to re-interview.

## Offers of employment

Offers of employment, both external and internal, may initially be made verbally but will always be confirmed in writing and specify a timescale in which the successful candidate should confirm their acceptance or rejection of the offer.

Written statements of "terms and conditions of employment /contract of employment" should be sent with the offer.

All offers will be conditional and subject to:

- Receipt of satisfactory references
- Right to work checks
- DBS checks, where relevant
- Qualifications check (if appropriate).
- Meeting the health requirements of the role
- Satisfactory completion of a probationary period, usually of six months


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## Background checks & references

Each successful external candidate will be informed if they are subject to any background checks (such as e.g. “DBS checks, FCA references or checks with credit reference agencies”). These will normally be made immediately following receipt of acceptance of the offer.

All successful candidates will be required to provide proof of their entitlement to work in the UK prior to starting work with us. In addition, and depending on the requirements of the post, we may also require proof of qualifications, driving licence or a medical report.

All offers of employment are made subject to the receipt of references that are satisfactory to us, unless the candidate has previously worked for us and left our employment no more than “six months” prior to the offer being made.

All external candidates must provide at least two employment references covering the past 3 years, one of which should be from their current or most recent employer where possible. Only written references will be accepted, and upon receipt, the employer will be contacted to verify their content.

Current CQC, CIW, and NISCC guidance recommends obtaining references from a candidate’s current or most recent employer, as well as from the most relevant previous employer. For example, if a candidate is applying for a role involving work with children but is not currently in such a position, a reference should be obtained from a previous employer where the candidate worked with children. This helps to confirm the details of their employment and the reasons for leaving.

Character references will only be accepted in exceptional circumstances and must be provided by an individual of professional standing. For further details, please refer to the ‘**List of Acceptable Character References’** document available in the Value-Based Recruitment/Education People Team toolkit.

For positions with an occupational requirement e.g. for the post-holder to be a practising Christian, a character reference will be required from a practising Christian in a pastoral or other accountable role within the church community.

References provided from personal email addresses will not be accepted. If a referee has left the organisation, candidates must instead supply contact details for the organisation’s HR department. For internal candidates, the Head of Setting will obtain a reference from the employee’s current line manager. All references will be held confidentially in the new recruit’s IDE folder.

All employment checks will be dealt with in accordance with our data protection policy.


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## Health check

After a conditional offer is made, the candidate will be offered a health screening using our Occupational Health Form to ensure they can perform the role they have been offered and to ensure that reasonable adjustments are made where appropriate.

If the information shows that the individual has a medical condition that could affect their ability to perform the role, the manager, in consultation with the People Business Partner / Head of People Education will assess what, if any, reasonable adjustments could be made to support the individual in the job.

If no reasonable adjustment can be made or is not operationally viable, then the job offer may be withdrawn. If the candidate refuses the health check, then the conditional offer will be withdrawn.

## Commencement of employment

People Admin should use Employee Checklist to ensure that the appropriate procedures are followed.

Each new employee will have a planned induction. For internal transfers or promotions, a short induction may also be necessary.

Each new employee is subject to a probationary period. During the probationary period, the employee's progress will be monitored, and the relevant assessments will be made and discussed with the employee. If necessary, the probationary period may be extended.

## Equal opportunities

We are committed to applying the equal opportunities policy at all stages of recruitment and selection. Shortlisting, interviewing and selection will always be carried out without regard to age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race religion or belief, sex, and sexual orientation.

## Diversity monitoring

As part of the application process, Shaftesbury collects diversity information in accordance with current legislation. This information helps us to monitor the effectiveness of our recruitment practices, promote equality of opportunity, and ensure compliance with legal requirements. For further details on how this information is used and stored, please refer to our privacy notice.


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## Disclosure and Barring Service (DBS)

Please see the Shaftesbury Disclosure and Barring Service Policy and Procedure for further details.

## Data Protection

We process personal data collected during the recruitment process in accordance with our data protection policy. Data collected as part of the recruitment process is held securely and accessed by, and disclosed to, individuals only for the purposes of managing the recruitment exercise effectively to decide to whom to offer the job. Inappropriate access or disclosure of job applicant data constitutes a data breach and should be reported in accordance with the data protection policy immediately.


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