

Best Practices on Shortlisting Candidates

These principles will assist hiring managers to identify items to consider when shortlisting the most suitable candidates to move forward in job competitions.

Should Hiring Managers use selection criteria when shortlisting candidates?

Hiring Managers should identify a standard set of selection criteria to be used when reviewing the applicant pool. The same selection criteria should be applied to all candidates throughout the shortlisting process. These criteria should consist of the minimum job requirements, education, experience and preferred qualifications.

Candidates who do not meet the minimum job qualifications for the position should be dispositioned. To do so, please update the candidate status to 'send decline' within the [Applicant Tracking System](#).

*Clear selection criteria should be established *prior* to shortlisting any candidates during the selection process.

What part of the applicant profile should be reviewed?

Documents to be reviewed during the selection process would include resumes, cover letters and supporting documentation that is applicable to the job competition.

How should internal candidates be reviewed or shortlisted?

Internal candidates should be reviewed against the same evaluation/selection criteria as external candidates. Eg.) minimum job requirements

If an internal candidate does not meet the minimum requirements of a position, it is not required to provide a face-to-face interview. Hiring Managers should contact their Recruitment Specialist if they require guidance on providing feedback to the internal candidate.

Is it necessary to conduct a phone interview/phone screen?

It is an industry best practice to conduct a short phone screen prior to booking the first interview. This opportunity to connect with suitable candidates will provide hiring managers with the opportunity to confirm information that has been submitted through the applicant profile.

Documenting the application of the selection criteria (shortlisting and screening)

It is important to keep a record for each candidate at all stages of the selection process. As they are discussed, record the reasons for why each applicant does not advance to the next stage of selection.

Overall, a detailed record of the consistent and fair application of selection criteria will demonstrate integrity in the decision-making process in the event the search process is challenged for any reason.

Upon fulfillment of an open job competition – All recruitment notes/documents are to be collected by the committee Chair/Hiring Manager for record-keeping purposes

PHONE SCREEN

This is an efficient way to identify candidates who may not possess the desired skills and abilities. It also provides an opportunity to determine if the job opportunity meets the candidate's expectations (location, salary, eligibility to work in Canada) and if the candidate is a strong match for what you are seeking. The phone screen will assist you in determining your candidate list for face-to-face interviews.

Sample Script

Hello..., My name is (manager name). I have received your application to the position of (position name) and I would like to take 10-15mins to discuss the opportunity with you in greater detail. Is now a good time to speak?

Confirm the position that they applied for? (title/length/location of position)	
Confirm current employer, and if they are actively seeking employment	YES NO

Advise the candidate that you would like to ask them a couple of questions;

Confirm if they would have any issue traveling to campus to work if require, confirm ability to work remotely if required.	YES NO
What is reason for applying to this position? What interested you most about the role?	
Probing: what are you looking for in your next opportunity? (location, type of working environment, salary)	
Where would you like to see yourself in 5years?	

Tell the candidate a bit about the position.

Title, location, confirm salary and start level expectation	
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Advise the candidate of a couple of key skills that you are looking for in your preferred candidate.

Closing

Option 1

At this time, we are contacting our most qualified applicants to determine if the position meets their expectations and to determine if we would be interested in moving forward with a face-to-face interview. We will be reaching out to a number of candidates and will be deciding on the next steps by the end of next week. All candidates selected to move forward for a face-to-face interview will be contacted, to schedule a mutually convenient time. If you are not selected to move forward, we will keep your application on file for a period of six months.

Option 2

At this time, we are contacting our most qualified applicants to determine if the position meets their expectations and to determine if we would be interested in moving forward with a face-to-face interview. In this case we would like to request that you come in for a face-to-face interview. Is this something that would be of interest to you?

If so, someone from my time will be sending you an email, with interview details. Can you please confirm your email address? This information will either be sent by email, phone or candidate profile.