Appendix B: Recruiting/hiring process checklist

This list is not an exhaustive guide to recruiting and hiring staff, but it provides a starting point for identifying and tracking essential tasks in the process.

Pre-interview process	Completed
Identify your staffing needs	☐
Create new job description (update current job description if one exists)	☐
Develop qualifications, characteristics, experience, and criteria needed for the position	☐
Determine salary range and compensation for the position	☐
Post the job – e.g., internal postings, online, newspaper, employment agencies	☐

Interview process	Completed
Screen resumes against qualifications and criteria established	☐
Create a short list of qualified candidates	☐
Develop standardized interview questions and rating scale	☐
Meet with all interviewers to determine the process for the interviews	☐
Conduct phone interviews with short list candidates	☐
Schedule interviews for qualified internal candidates (if any)	☐
Schedule interviews for qualified external candidates	☐
Conduct interviews	☐
Give candidates a copy of the job description during the interview	☐
Use a rating scale form to determine top candidates	☐
Discuss with interviewers which (if any) candidates will have a second interview	☐
Schedule second interviews (only if necessary)	☐
Reach consensus on the best candidate	☐
Check references	☐
Conduct background checks (if applicable)	☐

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Post-interview process	Completed
Make an offer to the selected candidate and send a letter confirming offer*	☐
Confirm written acceptance with selected candidate	☐
Notify interviewed candidates not selected via phone, email, or letter	☐
Ensure all necessary documents are in place for start date (e.g., emergency contact, vaccines, payroll)	☐

Onboarding	Completed
Notify current staff of new hire start date and role	☐
Prepare an onboarding package, which should include the policy and procedure manual and touchpoint person for questions during their onboarding	☐
Set up physical workspace, with required tools (computer, phone) and work-related access	☐
Develop a schedule for the first week, including having someone greet the employee on the first day and introduce the team and the space	☐
Set up employee with payroll, taxes and required programs	☐
Set up mandatory training sessions and role specific training	☐
Set up touch base with employee's supervisor at the end of first day, first week, first month	☐

The Offer package should include, but not be limited to, a letter outlining the start date, expected salary, reporting relationship, supervising relationship, job description, work hours, confidentiality agreement, and any other benefits or commitments that were negotiated with the candidate.