



Chapter Two: Staffing and Recruitment

[Introduction](#)

[Human Resources Management](#)

[Human Resources Advisors](#)

[Staffing Options at a Glance](#)

[Chart](#)

[Tips for managing staffing](#)

[Tips on managing a competition](#)

[Staffing - In Detail](#)

[Preparation](#)

[Priority consideration](#)

[Best Staffing Option\(s\)](#)

[Assessment and Selection Appointment](#)

Introduction

The "system" is flexible! There are alternatives to the full competitive process, each with its pros and cons. The choice is not always easy. The answer to "What should I do?" is often "It depends on your particular circumstances and your HR plan."

A glossary of staffing terms can be found at the back of this handbook.

The glossary has been prepared to give you informal explanations for common staffing terms.

These explanations are not meant to replace the technical/legal definitions.

HUMAN RESOURCES MANAGEMENT

You are in charge of staffing. You make all the substantive decisions and are accountable for them. You have to live with them. As the key decision maker, you control the process.

Staffing is faster if the process is planned with your HRA up front. Your HRA can be a helpful partner.

Human Resources Advisors (HRAs)

HRAs are technical experts and strategic advisors. Ask them for both types of advice to help develop an HR plan and staffing strategy for your whole organization. They can help implement these plans through each staffing action.

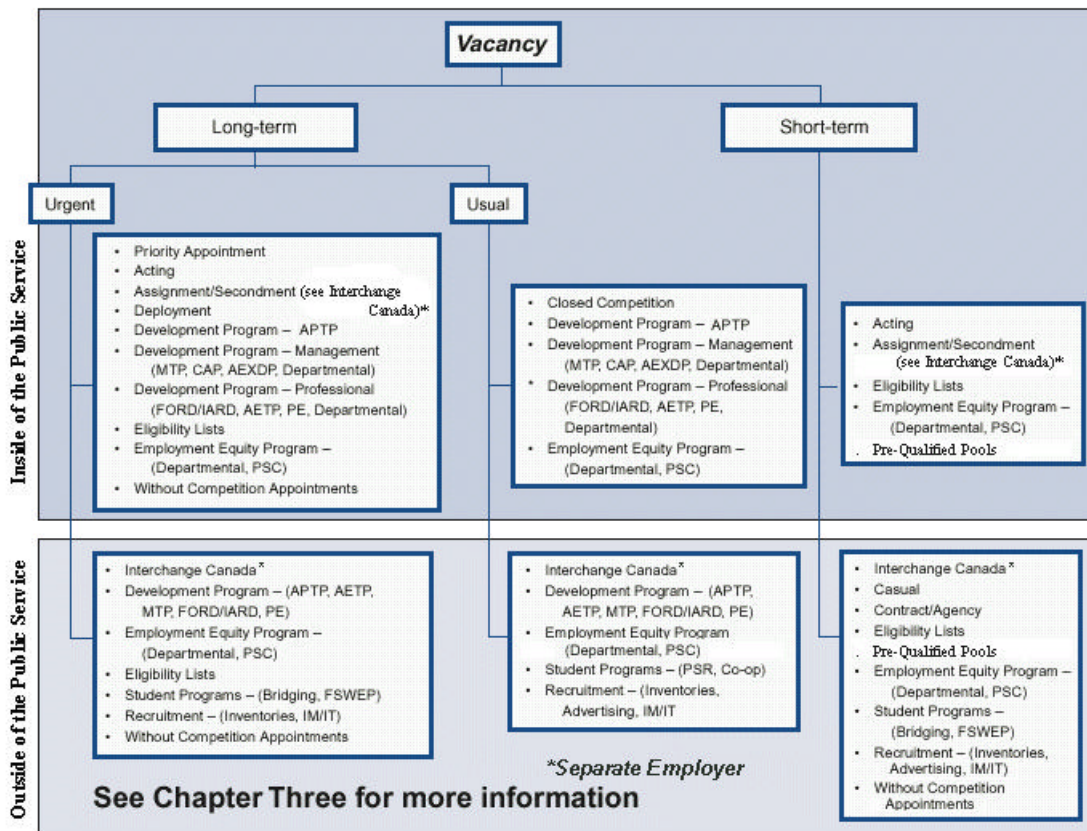
They do not control the staffing project. You do. They will advise you on your legal and policy obligations, and on staffing values, and can assist you in evaluating your options.

But at the end of the day, it's your decision!

STAFFING OPTIONS AT A GLANCE

The following chart identifies the possible staffing options you can consider when faced with a vacancy or when looking at succession planning within your area of responsibility. It classifies the options under long-term and short-term, urgent or usual, and identifies options for staffing (inside the federal Public Service) or recruitment (outside the federal Public Service). **For a listing of [staffing challenges and opportunities](#) and [the staffing options that might respond to these challenges](#), consult the electronic document [Developing a Staffing Strategy](#).**

Situation Chart/Decision Tree



If you have a vacancy, and your staffing requirement is long-term and urgent, you have the following options if staffing from the inside:

- Priority Appointment

- Acting
- Assignment/Secondment
- Deployment
- Development Program - APTP
- Development Program - Management (MTP, CAP, AEXDP, Departmental)
- Development Program - Professional (FORD/IARD, AEXTP, PE, Departmental)
- Eligibility Lists
- Employment Equity Program (Departmental, PSC)
- Without Competition Appointments

If you have a vacancy, and your staffing requirement is long-term and urgent, you have the following options if staffing from the outside:

- Interchange Canada
- Development Program (APTP, AETP, MTP, FORD, IARD, PE)
- Employment Equity Program (Departmental, PSC)
- Eligibility Lists
- Student Programs (Bridging, FSWEF)
- Recruitment (Inventories, IM/IT)
- Without Competition Appointments

If you have a vacancy and your staffing requirement is long-term but not urgent, you have the following options if staffing from the inside:

- Closed Competition
- Development Program - APTP
- Development Program - Management (MTP, CAP, AEXDP, Departmental)
- Development Program - Professional (FORD/IARD, AETP, PE, Departmental)
- Employment Equity Program - (Departmental, PSC)

If you have a vacancy and your staffing requirement is long-term but not urgent, you have the following options if staffing from the outside:

- Interchange Canada
- Development Program - (APTP, AETP, MTP, FORD/IARD, PE)
- Employment Equity Program
- Student Programs - (PSR, Co-op)
- Recruitment - (Inventories, Advertising, IM/IT)

If you have a vacancy and your staffing requirement is short-term, you have the following options if staffing from the inside:

- Acting
- Assignment/Secondment
- Eligibility Lists
- Employment Equity Program - (Departmental, PSC)

If you have a vacancy and your staffing requirement is short-term, you have the following options if staffing from the outside:

- Interchange Canada
- Casual
- Contract/Agency
- Eligibility Lists
- Employment Equity Program - (Departmental, PSC)
- Student Programs - (Bridging, FSWEF)

- Recruitment - (Inventories, Advertising, IM/IT)
- Without Competition Appointments

TIPS FOR MANAGING STAFFING

Have an HR plan

- Know your employees, their career objectives, training and development needs, and language skills.
- Know how close your employees are to retiring. Begin planning for their replacements before they leave.
- Develop a succession plan, including possibly hiring before the vacancy occurs.
- Know your candidate pool and labour market availability. (Your HRA can help you with this.)

Know the ground rules

- Know your departmental policies.
- Know the limits and scope of your delegated staffing authority. It may have changed.
- Know your HR unit's operational practices.
- Use your formal and informal networks. The better informed, the better equipped you are to manage the process and/or adapt to the unexpected.

Know your options (see Chapter 3)

- Read this handbook and refer to it often. Check Web sites for more detailed information and updates.
- Know which programs best help you meet longer-term goals.
- Knowing your options helps you develop more flexible plans.
- Think employment equity. Does your department have its own Employment Equity Program? For what groups? Do you need the PSC Ad Hoc Program?
- Use your formal and informal networks. Ask employees to refer associates or colleagues who might be an asset to your organization.

Think ahead: Start early

- Maintain current work descriptions and statements of qualifications in both official languages; review periodically.
- Keep a file of rating guides and assessment tools from previous competitions.
- Discuss projected time lines and work sharing with your HRA. Co-operate on concurrent tasks, e.g. you assess a candidate's personal suitability while your HRA verifies references for the reliability check.
- Identify critical factors that might eliminate candidates at any stage in the assessment process.
- If you have predictable, frequent turnover, create an inventory

of partially qualified candidates or hold competitions periodically so you always have an eligibility list for any vacancy.

- If you regularly hire external candidates, discuss possible recruitment strategies with your HRA and the PSC.

Think multi-purpose

- Before beginning your next competition, see who else has similar positions, would like to use your eligibility list and be willing to sit on your selection board to share the work and ideas.
- If the list will be used to fill similar positions, indicate it on the competition poster.
- Posters can be multi-purpose. Advertise term, indeterminate, and acting appointments and different regions and language requirements all on the same notice to create multiple lists that can be tailored for a variety of circumstances.
- You can also advertise a possible deployment and promotion at the same time and decide how to proceed based on the applications received.

Be efficient

- Assess each qualification. The PSC's Personnel Psychology Centre may have a standardized test for some of them. (Don't reinvent the wheel.)
- Make staffing an integral part of your workload; break the work into manageable chunks.
- Rotate staffing responsibility among members of your management team to share the work and increase their experience.
- Conduct a "paper board" to assess candidates on written information gathered through means other than interviews.
- Interview by telephone, conference call, or video conferencing.
- Be available for post-board feedback sessions. In some cases it may reduce the likelihood of appeals from candidates who really just want more information about their performance.
- If an appeal is filed, seek disclosure as soon as possible to move up the hearing date. Early interventions, such as mediation, may also speed up/resolve the process.

Use temporary staffing wisely

- Temporary staffing can fill gaps while you are staffing indeterminately.
- Using these options for truly temporary needs improves employees' perceptions of equity, fairness and transparency.
- Rotating acting appointments creates a natural, available candidate pool, giving employees equal opportunity to learn

about the job and develop their skills. Use employee/departmental career development plans to find your pool of potential candidates.

School's the tool!
(see Chapter 3 for details)

- Co-op/Internship Programs are affordable and don't require a classified position, but may take advance planning.
- The FSWEP gives you rapid access to students at any time.
- For the longer term, the Post-Secondary Recruitment and/or Management Trainee, Accelerated Economist Training, and FORD/IARD programs provide a recent graduate you can move into progressively more senior positions within your organization.
- If you're having trouble finding qualified people at the right level, look into developing your own training program, including sending your employees back to school part- or full-time.

TIPS ON MANAGING A COMPETITION

Faster Competitions through Concurrent Activities

Preparation stage

- Review your HR plan - determine your needs
- Meet with your HRA
- Consider options, values, employment equity, area of selection, closed or open competition
- Prepare/review a statement of qualifications (eliminate potential employment equity barriers)
- Consider assessment tools

Priority consideration stage

- Finalize statement of qualifications
- Assess persons entitled to priority and appoint if qualified

while your HRA

- Requests priority clearance, refers priorities to you if required, and drafts the notice of competition

Assessment stage

- Finalize assessment tools and rating guide
- **Select board members and consider those from other departments to enrich the perspective of the board.**
- **Ensure the members of the selection board are**

sufficiently proficient in either or both official language(s), as the case may be, to permit, without using an interpreter, effective communication between the board and the candidate in the language or languages that the candidate has selected for the examination, test or interview.

while your HRA

- Issues the notice

Selection stage

- Screen applications upon receipt (your HRA may pre-screen first and refer to you)
- Start assessing screened-in candidates
- Assess and rate candidates (with selection board)
- Discuss eligibility lists with HRA

while your HRA

- Starts scheduling tests, interviews, and so on
- May advise screened-out applicants and start verifying employment conditions or qualifications for candidates screened in (security, language, medical, etc.)

Note - Your HRA may act as a board member.

Appointment stage

- Gather all required documentation and prepare selection board report if required
- If delegated, sign letter(s) of offer
- Provide post-board feedback to candidates who request it

while your HRA

- May prepare letter(s) of offer and notice of results to other candidates (includes appeal rights if any; not applicable in open competitions).

STAFFING - IN DETAIL

Preparation

Define the requirements to determine what kind of job you must fill and the type of person you

need. Prepare a full or partial work description and statement of qualifications.

Here are some points worth pondering before you begin.

Pre-Staffing Checklist

- ✓ Have you checked your HR plan?
- ✓ Do you have the delegated staffing authority?
- ✓ Is the work permanent or temporary? For how long?
- ✓ Is the existing work description right?
- ✓ Is the classification level right to get the kind of person you need?
- ✓ What language abilities do you need in the job?
- ✓ What security level do you need?

Predominant values and management principles in action:

Representativeness. Other values and principles apply to differing degrees.

Ask yourself:

- How can I use this vacancy to improve employment equity representation?
- Are any of my requirements unduly restrictive?

★ Tip

- You can hire a person temporarily while indeterminate staffing is going on.

Create a Statement of Qualifications

A statement of qualifications lists the knowledge, skills, and personal attributes you seek in the person you hire: screening criteria and qualifications.

- Screening criteria are the pass/fail qualifications a candidate must have (e.g., education, experience, and language level - if imperative) to be considered further.
- Candidates are assessed on qualifications such as knowledge, abilities, aptitude (potential to learn the job), and personal suitability for the job, your team, and clientele.

To develop a statement of qualifications, use the work description and PSC *Standards for Selection and Assessment*. Your HRA may assist you in doing this.

Another helpful tool may be a competency profile that has been developed by your department and/or the PSC for positions similar to the one(s) you want to staff. Many have been created for jobs in the various functional communities, such as Finance, HR, Communications, and so on. Check with your HRA for more information.

★ Tip

- As you describe and list the qualifications you need, think about how you would assess them and how you could objectively determine if one person was actually more qualified than another.

Please note that the qualifications specified on the Statement of Qualification must be related to the work to be performed in the position, group of positions or level within an occupational group, as applicable. These qualifications, collectively, must cover the work to be performed, and must provide a basis for selection according to merit. Taking this approach will help you in justifying those qualifications, should any candidate request the PSC to review them. You should be aware that a candidate can request the PSC to review them at any time prior to the creation of the eligibility list.

Predominant values and management principles in action:

Fairness and equity. Other values and principles apply to differing degrees.

To ensure fair treatment and equality of access of all candidates, you must ensure that your statement of qualifications and selection tools are bias-free and that there are no systemic barriers.

Priority consideration

The [Public Service Employment Act \(PSEA\)](#) and [Regulations \(PSER\)](#) require that certain people—Minister's staff, lay-offs, surplus employees, and so on—be given priority consideration for appointment in or to the Public Service, without competition and without appeal. Persons with a priority entitlement are people to whom we have an obligation. They are individuals whose employment is in jeopardy and who look to you to give them fair consideration for opportunities that will allow them to continue their service.

Considering people with a staffing priority is no longer as time-consuming a process as it was during downsizing. There are relatively few persons with priority entitlements in the system today, and the clearance process is fully computerized. A PSC "robot" e-mails a reply to your request for clearance within minutes if no priorities are identified.

Finding a person with a priority who is qualified for the job may be the best thing you can hope for. You can offer the job and appoint them immediately, ahead of anyone else.

Did you know?

Employment equity program appointments only require consideration of persons with priority entitlement who are members of a target designated group for the program.

Since deployments are not appointments, they do not require priority clearance. Priority appointments can be a good option to fill an indeterminate job.

An exemption to a priority referral can be made if taking a priority person will result in an employee in your organization becoming entitled to a priority. (The PSEA provides that you don't take one to make one.)

Considerations

- Reclassification, acting appointments, deployments, casual employment, and some term appointments do not require priority clearance.
- While departments are responsible for finding alternate employment for their own priority employees, the PSC maintains an interdepartmental Priority Administration System to maximize placement opportunities for persons with priority entitlement.
- Consideration is required of both your own departmental employees with priority entitlements and persons with priority from the PSC interdepartmental priority inventory.
- Priority hiring can be used to meet long- or short-term needs.
- Hiring a person with priority entitlement requires minimal documentation, and there are no appeal rights.

Predominant values and management principles in action:
--

Fairness, transparency, and competency. Other values and principles apply to differing degrees.

Best Staffing Option(s)

If you were unsuccessful in finding a qualified person with priority entitlement, you must look elsewhere for candidates. Your range of options is really determined by your situation but, first, answer these three questions:

- Is the job term or indeterminate?
- If indeterminate, do you have time to look around or is it urgent?
- Where are you likely to find candidates? Do you look inside or outside the Public Service? What should the area of selection be?

Area of selection

You should consider the qualifications required, the level of responsibility, and the number of candidates that may be available when choosing the area of selection. The objective is always to find highly qualified candidates while balancing all the staffing values and management principles.

Special measures exist that may allow you to expand the area of selection for employment equity group members.

Inside or outside?

The PSEA requires jobs to be filled from within the Public Service unless it is not in the best interests of the Public Service to do so. Looking inside first is really a best practice for any employer of choice. Ask your HRA to help determine the area of selection to look for candidates. If you think it unlikely you will find anyone within the Public Service, you can look outside.

You can look inside and outside the Public Service at the same time, if you think an internal search may be unproductive or if you need more people than you are likely to find inside. You don't have to run fruitless closed competitions or keep increasing areas of selection just to prove there are no qualified candidates internally.

If, however, you run simultaneous open and closed competitions, you must offer the job(s) to all of the employees on the eligibility list created as a result of the closed competition before offering jobs to those on the eligibility list that resulted from the open competition.

Predominant values and management principles in action:
Equity, transparency, efficiency, flexibility, and competence. Other values and principles apply to differing degrees.

Quick options

a) Deployments, secondments, assignments and acting appointments

Deployments can be to a term or indeterminate position. The person becomes a member of your staff. A deployment cannot result in a promotion or change the tenure of an employee.

Secondments, assignments, and acting appointments are of a temporary nature; the person returns to their former duties at the end of the predetermined period.

Secondments/assignments involve an agreement between the employee and both managers, and can be terminated by any of them or extended by unanimous agreement.

b) Existing eligibility lists

Scenario 1: There is a valid existing eligibility list for the specific position(s).

The ideal situation—you can offer the job immediately to the next person on the list. There is no appeal period as any appeals were heard when the list was established.

FACT → **You must consider persons with priority entitlements before appointing from an eligibility list.**

Scenario 2: There is a valid eligibility list for a similar position(s).

You have two questions to answer:

- 1) Is the job you must fill similar enough to the one for which the list was established?
- 2) Did the advertisement (poster) for the competition that produced the list say "may be used to

fill similar positions"?

If you answer yes to both questions, you're home free. You can offer the job to the next person on the list, but you don't have to.

Your HRA should have a complete set of valid eligibility lists.

Best practice

Consider including the words "may be used for similar positions" on your posters. Treat the competition like any other project.

- Don't wait to line up board members. Ask them to help you as early as possible, even before the notice is out.
- Schedule interview dates well in advance to commit yourself and your board members, and as close together as possible to make it easier to compare candidates (and complete the process faster!).
- Allow enough time after a board to rate candidates while the information is fresh in your mind.

Assessment and Selection

Begin this phase as soon as the competition closes, earlier if you can. You need not wait for all applications to be received before screening them.

Screening

Screening eliminates those who do not meet the established screening criteria.

You may need to more precisely define the qualifications or combination of qualifications to screen applicants. Be precise especially when using qualitative words such as "recent" and "significant" and be prepared to explain.

Assessment and rating of candidates

Applicants must be assessed in the language of their choice.

Use any of the many existing assessment tools and methods or create your own. Assessment may include an interview by a selection board, use of written exams, [PSC Personnel Psychology Centre](#) standardized tests, as well as reference checks. You have a number of options and your HRA can be particularly helpful in identifying the best tools for your needs.

Ranking

With a numeric rating scheme, candidates' scores determine their rank. Narrative or qualitative rating requires the board to write a detailed, precise explanation for relative rankings.

Be sure of your final decisions. If anything bothers you about a candidate, address and resolve it. Don't skip reference checks, go through the motions, or rush just to get the process over with. Check the references of the top candidate(s) yourself. Follow-up on the initial reference

check to clarify ambiguities. Ask the pointed questions that only one manager can put to another, especially about a person you are about to hire from them.

FACT → The [Access to Information Act](#) and [Privacy Act](#) and regulations require that all written notes related to a selection process be kept on the staffing file.

★ **Tip**

- Assessment can be a fairly complex issue. You should start discussing your options as early as possible with your HRA, ideally when you are developing the Statement of Qualifications.

Accommodation

Your HRA should confirm whether persons with disabilities require accommodation before they are invited to be assessed, e.g., sign-language interpretation, technical aid, or physical location requirements. You cannot ask what the disability is. If a candidate can't come to the board, take the board to the candidate - assess and interview persons who need technical aids in their own workplace. The PSC Personnel Psychology Centre can assist you in determining what accommodations may be made, if these cannot be easily determined.

There are many ways to accommodate persons with disabilities so that they—and you—get a fair and full assessment of their knowledge and capabilities. **Please contact your HRA for further information or visit the [Employment Equity and Diversity website](#).**

Predominant values and management principles in action:

Fairness and transparency. Other values and principles apply to differing degrees.

Sometimes, to be fair, you have to treat people differently. This is especially true for assessing the real abilities of persons with a disability. You should be clear and up-front about the relative importance/weight of the various tests that will be used, various rated requirements, and the scoring system for them (e.g., pass marks).

Appointment

Conditions of employment

Unlike screening criteria to assess candidates at the outset, conditions of employment are only checked at the end and only for the successful candidate(s). It is simply impractical and costly to subject everyone to a security clearance or medical exam before interviewing them.

Before you offer the job(s) to the successful candidate(s), they must satisfy the conditions of employment (medical, security, reliability) that are mandatory for the job. You can, however, create an eligibility list and announce the results as well as deal with any appeals before all

conditions of employment are met. Persons who don't meet these conditions cannot be appointed, no matter how well-qualified they are otherwise.

Medical examination / security checks

If the position requires a medical examination and/or a reliability/security check, the successful candidate must supply the required information by the date specified. The more complex the medical exam or higher the security level, the longer it takes.

★ Tips

- The names of qualified candidates can be placed on the eligibility list, and the candidates advised of their standing pending the results of the medical and security checks.
- If you have confirmed that a lower-ranked candidate meets the conditions of employment, you can offer them a job as long as you hold a job open for all higher-ranked candidates who have not yet met the conditions.

Language Assessment

If the position is Bilingual Imperative, the qualified candidates must have valid Second Language Examination (SLE) results to show they meet the required level of bilingualism or be tested before their names can be placed on the eligibility list.

If a position is Bilingual Non-imperative, it may be filled by a candidate who does not meet the language requirements but is eligible for language training or is otherwise excluded from meeting the requirements. The employee, unless excluded, then must attain the required level of proficiency in the second language within two years. If unsuccessful, employees must be moved into another position for which they meet the language requirements.

Note: Candidates must pass the SLE before they can be offered bilingual term appointments of over three months.

Eligibility list



An eligibility list is a legal requirement as set out in the PSEA, which states that appointments as a result of a competition "shall be made from an eligibility list...."

In closed competitions, qualified candidates are listed in descending order of merit, with the highest-ranking candidate at the top.

In open competitions (i.e., open to the public), qualified veterans are listed first, then survivors of veterans, other Canadian citizens, and then non-Canadians. Your HRA will ensure the proper order is respected.

An eligibility list can be established with a validity period from one day to two years. If initially created for less than two years, it can be extended (before it expires) any number of times up to the two-year limit. Include enough qualified candidates on the eligibility list to fill your

foreseeable needs and in case the top candidate(s) turn down your job offer. If you meet your needs for the next two years, it is well worth the effort.

When establishing eligibility lists, carefully consider their potential future use. Don't put 45 names on an eligibility list for one vacancy.

Notify candidates

Once an eligibility list is established, all candidates must be notified of the results of the competition. A copy of the list is attached to the notification advising them of the competition results; that they can get feedback on their performance; and, in a closed competition, that they have a right of appeal.

Recourse

See Chapter 4.

Letter of offer

A letter of offer typically includes the salary range for the job, the starting salary, the duration of the appointment, and, if applicable, terms for language training, probationary period, relocation provisions and expenses, and union membership. Attachments usually include the Conflict of Interest Guidelines and Declaration form, and an Employment Equity Survey package.

There are technical and legal reasons for the wording in letters of offer. Standard paragraphs exist. A letter of offer is a legal instrument, and an accepted letter of offer is binding on you, the offering manager. So read it over carefully before you send it; discuss anything you are not sure of with your HRA. You can sign the letter if you have delegated staffing authority from the deputy head.

Did you know?

You can negotiate the starting salary of an appointee from outside of the Public Service (within Treasury Board guidelines).

Probation

New appointees to the Public Service are normally on probation for one year. During this period, you have an opportunity to assess and evaluate the performance of the employee. You are responsible for providing proper training and coaching in order to give the employee the opportunity to climb the learning curve. If performance issues arise, deal with them. Advise the employee early and provide the required assistance. Work to protect your investment.

There are ethical, legal and practical reasons to give new employees a fair chance to prove themselves. Ultimately, it is in your own best interest to develop an effective employee.

Did you know?

A probationary period cannot be extended under any circumstances.

The probationary period for persons with disabilities requiring job accommodation does not

start until they are accommodated in the job. That means when they have all the required technical or other aids necessary to be able to do the job.

Predominant values and management principles in action:
--

Fairness. Other values and principles apply to differing degrees.

If, in the end, new employees do not work out, and you wish to reject them on probation, discuss it with your HRA early, because there are legal implications (notice period) when taking this action. Don't leave it to the last minute. You may find that you cannot take the required action.

Last updated: 2004 03 25

Canada^{ca}