INTRODUCTION TO

RECRUITMENT

A step-by-step guide for managers

IN THIS GUIDE

Before you start

Take some time to familiarize yourself with the contents, then keep it close by for easy reference. Keep an eye out for these icons throughout the document as they are meant to focus your attention on important steps and actions:

REMEMBER
Important reminders and key information to keep in mind

HUMAN RESOURCES SUPPORT
A prompt in the step which may signal a need to reach out to an HR Representative

PRO TIP
Actions that managers can take to go the extra mile and apply a leadership competency

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INTRODUCTION TO RECRUITMENT:
A step-by-step guide for managers

Step-by-Step Process — Why does it matter?

In an increasingly competitive international market, UBC is committed to attracting and retaining excellent people at the university. Understanding the recruitment process is important as it ensures the acquisition of skilled employees and leads to satisfied and motivated teams. This guide is designed to help understand and apply consistent hiring practices to ensure that UBC is hiring exceptional candidates throughout the university through fair and equitable recruitment.

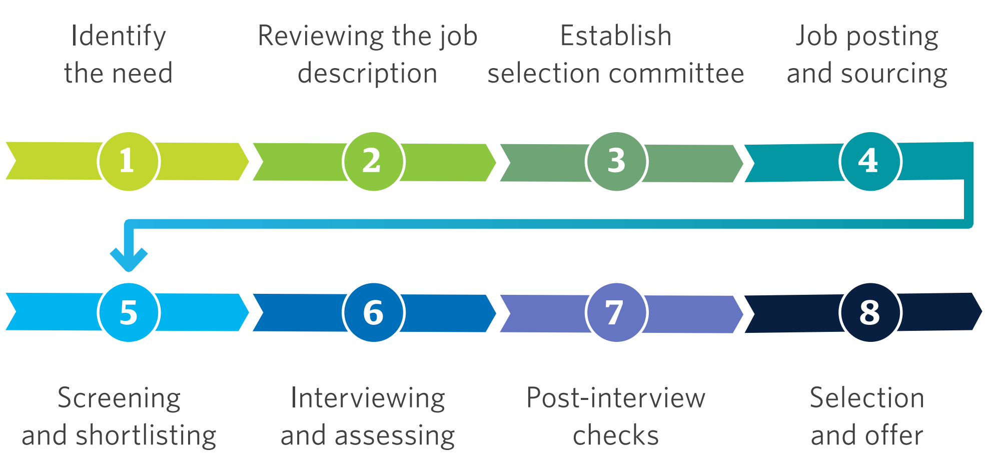
Why effective recruitment practices at UBC matters:

- **Attract top talent:** Ensures high-quality employees.
- **Promote diversity:** Helps to build a diverse and inclusive community.
- **Enhance reputation:** Strengthens UBC's commitment to people.
- **Boost retention:** Recruiting the right talent leads to improved retention.
- **Optimize resources:** Uses time and resources efficiently when recruiting.

Following this guide will lead to equitable treatment for all candidates by identifying clear criteria and processes which support the efficient and timely recruitment of outstanding employees.

This Guide is intended to explain the stages of recruitment at UBC.
For Workday steps, please refer to the applicable [knowledge-based articles].

Overview of the process



STEP 1: IDENTIFY THE NEED

The initial phase of any recruitment cycle is recognizing the need. It's essential to conduct a thorough needs assessment during this phase to ensure the vacancy is genuine and that hiring a new employee is the best solution.

Before getting started...

Identifying the need for a new hire is the critical first step in the recruitment process. It's essential to understand why you're looking to fill a position and ensure that you are making the right decisions. There are several common reasons for identifying the need to hire:

- **Employee departure**: When someone leaves the team—whether through resignation, retirement, or internal transfers—there is often a gap that needs to be filled to maintain the team's workflow and productivity.

- **Expansion or special projects**: Sometimes, your department may be growing, or you might have a special project that requires additional expertise or extra hands. In such cases, hiring can be essential to meet new demands and deadlines.

- **New skill requirements**: As organizations evolve, there may be a need to hire for roles that require different skills or knowledge to keep up with technological advances or changes in the industry.

- **Seasonal or temporary needs**: There are also times when you need extra support for a limited period, whether it's due to seasonal increases in workload or temporary gaps that require a short-term hire.

- **Matrix Reporting:** There may be cases where a role has matrix reporting. Matrix reporting are positions that report to one supervision but have functional (dotted line) reporting to another manager. Where applicable, ensure approvals and agreements are secured at each stage of the recruitment process through the appropriate matrix reporting channels before proceeding with any actions.

Clearly defining the need behind your recruitment efforts helps set the foundation for the next steps. It ensures you're targeting the right candidates with the necessary qualifications and skills. Identifying the need is not just about filling a role; it's about ensuring the role fits with your broader team and organizational goals.

STEP 1: IDENTIFY THE NEED

When considering the need to hire, you should conduct a needs assessment. It is important to review hiring needs and determine if recruitment is required.

Start by reviewing and analyzing the following:

- Budget
- Job specifications
- Team structure
- Skills/qualifications needed
- Workload and current workforce evaluation
- Urgency and timing
- Skills needed
- Workforce planning and labour market conditions

Do you need a temp employee until you can fill a role or do you need recruitment expertise for your hiring process? Contact **Hiring Solutions** to discuss your specific needs.

PRO TIP

Get acquainted with **UBC's HR policies** (e.g. Employment Advertising Policy HR 11) and the applicable **collective agreement/terms & conditions of employment** before proceeding to the next steps.

Contact your Departmental HR Representative for support as required.

STEP 2: REVIEWING THE JOB DESCRIPTION (JD)

A well-defined Job Description (JD) is a document which outlines the responsibilities, qualifications, and expectations associated with a role; and serves as the primary reference for both the hiring team and the applicants.

Crafting an accurate JD ensures that potential candidates understand the role they're applying for, leading to a better fit for both the organization and the individual.

Preparing job description

- Review current job descriptions.
- If you need some ideas or would like to explore other options, request examples of work descriptions from your HR Representative.
- Review **UBC's classification benchmarks and occupational guidelines**.
- Consult the following **Staff Job Evaluation** site.
- If you need to create a new JD, build it around the required work and keep it clear and concise. Ensure that qualifications and duties are listed in order from most to least important.
- When it comes to recruitment, consider that candidates must meet all the minimum qualifications, which are standard across all positions of the same classification. When building a work description, it is important to have enough but not too many, qualifications on your job description.

HR SUPPORT

Partner with a Compensation Associate/Consultant **before** submitting the JD, if needed. If you need Workday support, consult with your Departmental HR Representative for applicable steps.

STEP 2: REVIEWING THE JOB DESCRIPTION (JD)

Preparing job description (cont.)

- Be mindful about how you would assess qualifications. Experience, education and certifications are typically assessed via applications while other qualifications are assessed via tests, interviews and references.
- Job descriptions are meant to be designed around the actual work required, not individuals. Refrain from building job descriptions tailored to individuals or that reflect future responsibilities.
- Some positions, including M&P roles, require additional review/approval by a Central HR Compensation Consultant. Please ensure to factor this in to your timelines when creating a position.
- The position should be reviewed to determine if a background check (criminal, credit, credential, drivers abstract, vulnerable sector check, etc.) is required as it will be important for the job posting, post-interview checks and job offer.

  Please review the following website on background checks or contact your Departmental HR Representative to discuss.

- If the position exists, **please update the existing position** in Workday.
- If the position does not exist, please **create a new position** within Workday.

PRO TIP

CARING LEADERSHIP

BE MINDFUL OF LANGUAGE

Activate your **Inclusive Leadership Competency** by using clear, concise, and non- discriminatory language. If you want to take it a step further, use tools such as Microsoft Office 365 inclusivity checker to apply EDI language for job descriptions. Avoid technical terms and acronyms.

STEP 3: ESTABLISH SELECTION COMMITTEE

When establishing a selection committee, it is important to understand the role of a hiring manager and the role of selection committee members:

Hiring Manager:
The hiring manager is typically the decision maker and the person responsible for the overall recruitment. They define the job requirements, participate in interviews, and decide which candidate to hire.

Selection Committee Member:
A selection committee member is part of a group that evaluates candidates during the hiring process. This committee may consist of various stakeholders, including hiring managers, human resources representatives, and sometimes peers from the team.

Selection committees play a key role in the following areas:

- **Determining parameters for application review**
- **Evaluating candidates**
- **Developing interview questions**
- **Making recommendations for hire**
- **Conducting interviews**
- **Ensuring fairness throughout the process**

Ideally a committee consists of 2-3 people, but larger panel interviews may be used for higher level positions. As the hiring manager is the decision maker, they should be part of the selection committee along with others with relevant experience or HR expertise and no conflicts of interest. Establish a diverse selection committee, when possible.

STEP 3: ESTABLISH SELECTION COMMITTEE

The selection committee, once established, should meet to discuss the following:

- Review work requirements as identified in the job description.
- Discuss operational and department needs that may drive hiring decisions.
- Establish a recruitment timeline by working backwards from the desired start date. Consider all stages, including time for posting, sourcing, screening, interviews, reference checks and job offer. Block time in calendars for key stages and commit to a schedule.
- Establish roles including:
  - » Who will screen Resumes?
  - » Who will contact candidates?
  - » Who will develop and review interview questions and rubrics?
  - » Who will schedule interviews?
  - » Who will conduct reference checks?
  - » When will the selection committee regroup to discuss hiring decisions in order to make an offer?

Throughout a hiring process, you may also be supported by HR professionals and/or administrators who will provide valuable insights into the hiring process, can post your position, screen resumes, contact candidates, etc. In some cases, dependent on your Faculty or Department, the HR Professional and the Administrator may be the same individual or could be different people.

WORKDAY TIP

There are specific roles within Workday for individuals designated as **Recruiters** and **Hiring Manager** within Workday. Dependent on your role, you will have certain access, approvals and functions within a job requisition.

PRO TIP

It is recommended that the hiring manager and selection committee members complete the [Hiring Equity]() and [Accessible Interviewing & Accommodations]() courses prior to embarking on the recruitment process.

STEP 4: JOB POSTING & SOURCING

There are a variety of considerations in picking the right advertising strategy:

- The type of job, the job market within and outside of UBC, locally, nationally or internationally.
- Current **labour market** trends.
- Your advertising budget should you be considering paid job boards. For broader visibility and reach, you may wish to consider paid job boards, in which case you will need to determine an advertising budget.
- Ads posted on third party sites must follow **UBC Branding** Guidelines and include the **University diversity statement**. These have been added to job descriptions by default and will appear on our workday postings.
- For positions that require a background check - please add the following note to the job posting: "This position is subject to the satisfactory completion of required background checks".

Useful resources

- **Review Policy HR11** – for explanatory notes on **Employment Advertising**
  - » Provides guidance on merit, foreign candidates, posting length, advertising and non-advertising requirements.
- **Staff positions:** Collective agreement requirements
  - » Provides guidance on processes, posting length, appropriate consideration of candidates, etc.
- **Faculty positions:** Faculty recruitment guidelines
  - » Steps and specific information related to Faculty recruitment.

PRO TIP

1. **Internal promotion/reassignment for non-unionized roles**
In certain and rare instances, for non-unionized roles, if you have an internal candidate in mind, you may be able to post the position with the following statement added: *This position is expected to be filled by promotion/reassignment and is included here to inform you of its vacancy at the University* If you feel you have this scenario, please contact your **Departmental HR Representative** to discuss.

2. **How to request an advertising exemption**
In special circumstances, the responsible executive may waive UBC's advertising requirement. A request for a waiver must be made and fully approved in advance of any job offer using the UBC Employment Advertising Waiver Request Form (HR11). Please contact your **Departmental HR Representative** to discuss.

STEP 4: JOB POSTING & SOURCING

Creating a job posting in Workday

Make sure you review the Workday Knowledge Base Article on how to submit a job requisition: **Workday knowledge base – How to create Job Requisition and Post - Single Position**.

Where to post your job

Here are the key recruiting sites used to post UBC jobs:

1. **UBC Careers site**
   In general, the majority of staff and some faculty positions at UBC are to be posted on the **UBC careers site** through **Workday**. For Workday resources and help visit the **Integrated Service Centre**.

   Note - Posting on the UBC Careers site will ensure that candidates understand and agree that UBC collects personal information in accordance with the Freedom of Information and Protection of Privacy Act (FIPPA). Information will remain confidential, and will only be used or disclosed as authorized under the FIPPA.

2. **LinkedIn and Indeed**
   Please note when jobs that are posted via Workday on the UBC Careers page, they are automatically uploaded to LinkedIn and Indeed. LinkedIn also offers promoted posts should you feel your opportunity needs greater audience exposure. Should you want a promoted post on LinkedIn or are interested finding and identifying potential candidates for job opportunities using LinkedIn's advanced search filters and outreach tools, please contact **Hiring Solutions** for support.

3. **Optional Job Boards**
   There are a variety of job boards that you can use to further promote your job posting for broader or targeted exposure. Some examples include the WorkBC Job Board, Service Canada Job Bank as well as diversity and other paid job boards. If optional boards are used, they should include the same information written on the job posting and redirect candidates to apply via UBC Career website.

Please contact your **Departmental HR Representative** for information and support. You may also explore additional options via **UBC Hiring Solutions**.

STEP 4: JOB POSTING & SOURCING

Job Sourcing

Job sourcing in recruitment involves actively finding and engaging potential candidates for an already posted job opening.

Steps for Job Sourcing:

1. **Job Boards & Resume Databases**
   Search job boards, resume databases, and niche job sites to find additional candidates beyond applicants.

2. **Share the Job Posting in Your Network**
   Share the job posting with your personal and professional networks including LinkedIn to increase visibility and referrals.

3. **Utilize Professional Groups & Forums**
   Post the job opening in industry-specific LinkedIn groups, online communities, or forums to attract more candidates.

4. **Attend Networking Events**
   Participate in industry events and conferences to connect with potential candidates and promote the job posting.

5. **Track & Follow Up**
   Keep track of sourced candidates and follow up with them to gauge interest and move them through the process.

Please contact your **Departmental HR Representative** for information and support. You may also explore additional options via **UBC Hiring Solutions**.

STEP 5: SCREENING & SHORTLISTING

Screening is objectively assessing each application against the minimum and preferred qualifications set out in the job profile and job posting to determine which applicants will be considered for further assessment. Taking the time to screen applications thoroughly and systematically will ensure you have the best selection of applicants moving forward. It is important to use a document to track your observations when screening.

What to screen on applications?

To screen applicants, you may use information obtained from one source or combination of sources such as the applicant's resume, cover letter or other submitted material. Screening should be done in an efficient and consistent manner and should be based on:

- **Minimum and preferred experience**
- **Minimum and preferred educational requirements**
- **Equivalencies or equivalent combinations of education and experience**
- **Occupational certifications/ professional designations** can be used only if possession or eligibility for such credential is a bona fide (necessary) occupational requirement.

Key considerations when screening applications

- » Use only stated selection criteria on the job posting; new criteria cannot be introduced when screening.
- » Review the required documents outlined in the job posting against the essential (minimum) selection criteria stated in the job posting and/or job profile.
- » Equivalencies or equivalent combinations of education and experience must be applied consistently for all applicants.
- » Desirable (preferred) qualifications are used when a large number of applicants meet the essential (minimum) qualifications.
- » Do not make assumptions and avoid stereotyping: make sure you check facts against factual criteria.
- » Look for information which gives evidence of the presence of required education and experience. It is important to consider depth and breadth of experience while considering transferable skills and equivalent experience.
- » When screening on educational requirements, you must consider foreign degrees that have been granted Canadian equivalency.
- » Consider candidate's **legal entitlement to work in Canada** ensuring they can provide required documentation, for example.

In most cases, when screening applications, you will want to screen applications down to about 5-10 candidates.

STEP 5: SCREENING & SHORTLISTING

Order of consideration for applications

Prior to screening all applications, Policy HR11 **Employment Advertising** or **Collective agreement requirements** may require you to consider candidates based on seniority, recall or other reasons. Please consult the applicable resources or discuss with your **Departmental HR Representative**.

Shortlisting

In most cases, it is recommended that a designated selection committee member has 15-30 minute brief discussions with the large pool of candidates (5-10) to short-list down to the top 3-5 candidates to move to testing or panel interviews. During shortlisting, it is recommended to discuss the role, salary expectations and any other particulars about the role to help narrow down the pool of candidates to interview.

Received too many applications or don't have time to screen or shortlist? You can contact Hiring Solutions for assistance.

WORKDAY NOTE

It is important to let candidates know when they are screened out as soon as possible. Find out more about managing the job requisition in Workday at this link.

PRO TIP

INCLUSIVITY WHEN SCREENING

It is important that criteria be fair, reasonable and inclusive in order to minimize bias. Please consult the Equity and Inclusion Office Resources for more information on how to ensure inclusivity in your selection processes.

STEP 6: INTERVIEWING AND ASSESSING

The assessment phase is a critical step in the recruitment process, allowing hiring managers to evaluate the knowledge, skills and competencies of potential candidates. It provides an opportunity for the hiring committee to get a deeper understanding of the applicant and for the applicant to gauge their interest in joining the University.

STEP 1: Review minimum and preferred qualifications of the role on the work description.

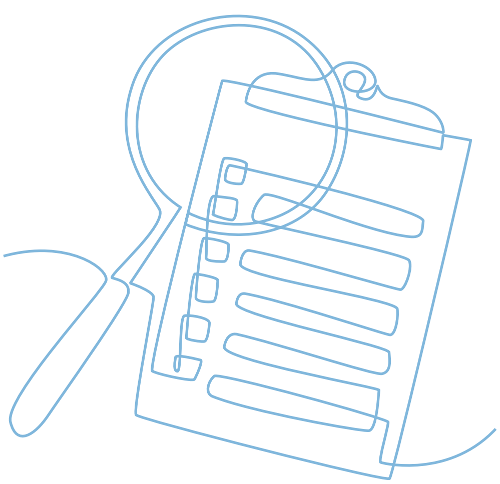
STEP 2: Develop consistent methods (tests, interviews, presentations, simulations) to assess all minimum qualifications and any preferred qualifiications.

STEP 3: Confirm how candidates responses will be rated.

STEP 4: **Schedule interviews and provide interview expectations to candidates.**

STEP 5: Conduct the interviews.

STEP 6: Evaluate responses/ finalize marking/ document rationale.



STEP 6: INTERVIEWING AND ASSESSING

Interviews and assessments

- When inviting candidates to an interview, provide them with clear details about what to expect, including the interview's location, expected duration, number of selection committee members and appropriate attire.
- Develop or update an interview guide (e.g., use an evaluation rubric) that includes behavior-based interview questions linked to the minimum and preferred qualifications.
- Interviews should be kept to an hour or less when possible. Ensure that the candidate is given sufficient time to respond to each question, which may mean limiting the amount of interview questions to allow time for probing and discussion.
- Time between interviews is important for selection committee members to discuss and debrief on candidate responses.
- Effective note-taking can assist in ensuring a clear record of responses is kept by the selection committee members.
- Using a panel interview and using the same assessment methods and tools have many benefits including increased transparency, valuable input from panel members, consistent marking and final decision reached by consensus.

Useful resources

- Interview Guide includes a guide for interviews, template, rubrics and sample interview questions.
- **What may I ask** and **What You Can and Can't Ask an Applicant with a Disability**
- Equity and Inclusion Office
  Guide to Equitable Hiring Practices: Faculty
  Guide to Equitable Hiring Practice: Staff
- Centre for Workplace Accessibility training for **Accessible Interviewing & Accommodations**

REMEMBER

- Inquire about accommodation and accessibility support for candidates prior to the interview.
- Be mindful of your unconscious bias throughout the interviewing and assessment process.
- Avoid questions related to human rights grounds during the interview, and ensure timely.

STEP 7: POST-INTERVIEW CHECKS

After the interview phase, it's imperative to conduct post-interview checks to validate the information provided by candidates and ensure their suitability for the role. This typically consists of reference checks and background checks dependent on the role.

Reference Checks

- A reference check is an evaluation of an applicant's past job performance, based on conversations with people who have worked with them.
- Like an employment interview, reference checking is most effective when it is well structured.
- It is recommended you complete reference checks with a minimum of two supervisory referees.

Structured reference checks are:

» **Job-related and tailored for the role being staffed: Structure and tailor the reference check around job requirements.** This will ensure that all applicants are treated consistently and that we obtain comparable information for each applicant.

» **Meant to verify experience:** Reference checks can effectively verify the examples provided by candidates during interviews, ensuring accuracy and credibility of their experience.

» **Based on observation of work:** The information that is provided by a reference provider must be based on their own experience observing or working with the applicant. Try to get specific information from a referee.

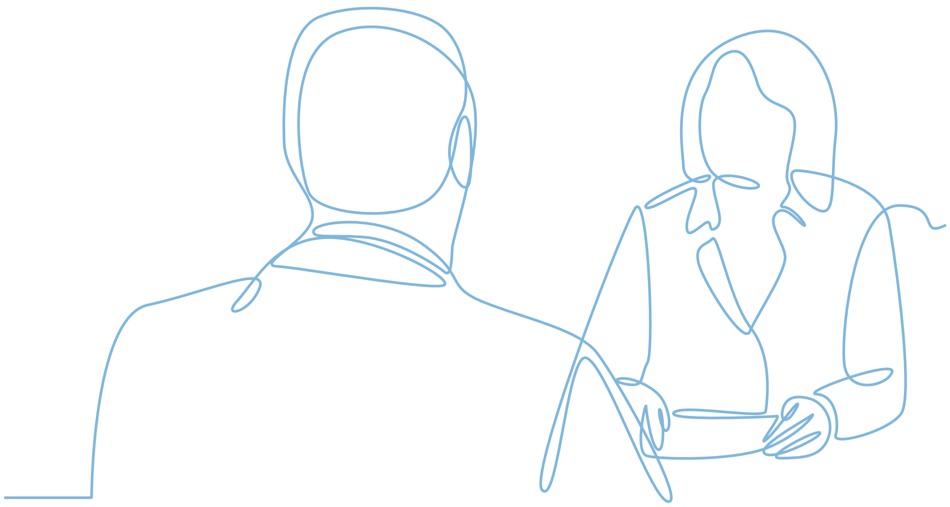
Background Checks

- Background checks are required for certain Senior Level roles as well as for roles within specific Faculties/Departments. Learn more about background checks at UBC.
- When a background check is required, please complete the background check request form available through your Departmental HR via the HR Advisory Services & Employee and Labour Relations Sharepoint site.
- Completed forms can be sent to: hiring.solutions@ubc.ca (Vancouver) or ubco.hr@ubc.ca (Okanagan) for processing. This is an interim process until Workday Integration is available in Fall/Winter 2025.
- Some background checks may require more than a criminal record check (EG. social media, credential and/or credit checks). Please review guidance on background checks and consult with your Departmental HR Representative to ensure the correct checks are requested.
- Employees and volunteers who work with or have unsupervised access to children or vulnerable adults and individuals who belong to a professional body that required a criminal record check as a condition of membership will to follow current practice. Learn more about background checks at UBC.

STEP 7: POST-INTERVIEW CHECKS

WORKDAY NOTE

While a candidate may not have the qualifications for your particular role, we need to treat them professionally so that they consider applying for other roles at UBC. Let candidates know when they are no longer being considered for the role as soon as possible. Find out more about managing the job requisition in Workday at this link.



PRO TIP

ACTIVATE YOUR CARING LEADERSHIP COMPETENCY

When an applicant has not been in the workforce recently or at all, consider broadening references. A supervisor from a volunteer job, an employment program manager, job coach, or an instructor/professor/teacher may be able to provide relevant information about the applicant's ability to do the job.

CARING LEADERSHIP

HR SUPPORT

For candidates requiring immigration or relocation, partner with Housing, Immigration and Relocation for support.

STEP 8: SELECTION & OFFER

Congratulations—you have completed the process and are ready to make an offer!

Making a job offer

When talking to your prospective employee, be sure to cover the following details with them:

- The position/position level and the employee group.
- Their salary, benefits, the day they will start, and the job's end date, if applicable. Please note:
  - » **In unionized roles**, salary is determined by the parameters of the applicable collective agreement. Please refer to the applicable **collective agreement**.
  - » **In non-unionized roles**, the midpoint of the range represents an employee that possesses full job knowledge, qualifications and experience for the position. In the normal course, employees will be hired, transferred or promoted between the minimum and midpoint of the salary range for a job.
- **The probation/orientation period.** Most positions have a standard probationary period and all employees who are new to the university must complete a full probationary period. Please refer to the applicable **collective agreement**.
- **When a background check is required**, clearly indicate to the candidate verbally and in the employment offer that "this job offer is conditional upon the satisfactory completion of required background checks".
- **Confirm candidate is legally entitled to work in Canada.** When hiring, Canadian citizens and permanent residents are given priority. However, where you can't find a qualified Canadian citizen or permanent resident and are considering hiring a qualified foreign worker, there may be specifics related to eligibility, work permits, etc. that must be adhered to. If you are hiring someone with a temporary social insurance number, they are only permitted to work to the end of their work permit eligibility expiration.

Please note that in many cases, these discussion are done over the phone or in person but please be aware that verbal job offers can be as legally binding as any other type of offer.

Once you have confirmed information with your prospective employee, the next step would be to issue a job offer in writing. It is recommended that job offers be generated from Workday as it ensures the most up-to-date information and clauses are included in the offer letter. If, for some reason, you need to provide an offer letter outside of Workday, please confirm with your **Departmental HR Representative** that the offer letter contains the most recent applicable language.

STEP 8: SELECTION & OFFER

Job offers

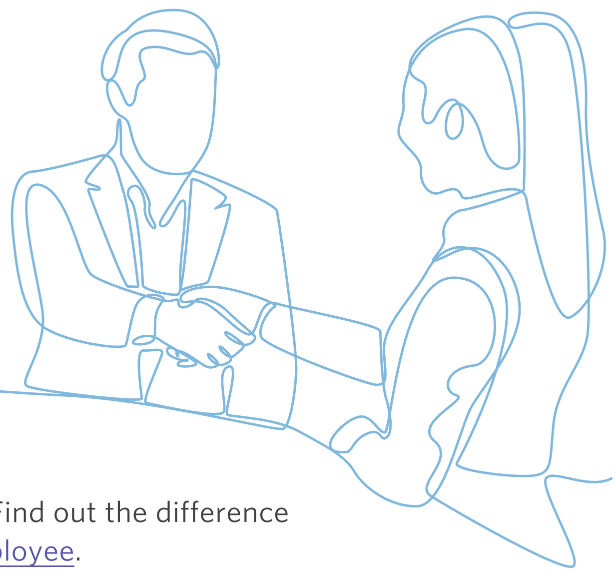
Posted Positions

Please review **Recruitment Hire** knowledge base for guidance on creating an employment offer.

New employees must electronically accept their employment agreement within Workday before the hire is complete and the onboarding process can begin.

Direct Hires

Please review **Direct Hire** knowledge base. If you're unsure of how to make an offer and would like assistance, please call your **UBC Human Resources associate**.



Useful resources

- Are you sure this is a new employee hire? Find out the difference between an independent contractor or employee.

WORKDAY NOTE

Please review the Workday **Recruitment hiring guide** and **recruitment hire steps**.

PRO TIP

ETHICAL LEADERSHIP

ACTIVATE YOUR ETHICAL LEADERSHIP COMPETENCY

Ensure proper storage of interview guides and other related documentation by adhering to **UBC Records Management Retention Schedules**.

NEXT STEPS...

Prior to start

Consider the essentials needed for onboarding (tools, equipment, workstation, IT accounts, software, etc.). If securing a laptop, workstation, email setup, and phone may take time, it is advisable to choose a start date that aligns with the availability of these tools and resources.

Onboarding & Orientation

Following a successful recruitment process, the journey truly begins when a candidate accepts our offer. This pivotal moment transitions into our comprehensive onboarding program, designed to integrate new hires smoothly into our organizational culture and operational dynamics.

Use the **Manager's Onboarding Guide and the New Hire Onboarding Checklist** to help guide your interactions as a manager with your new hire during their first weeks.

Probationary Period

It is crucial to recognize that the subsequent probationary period is not merely a formality but an extension of the assessment phase. During this time, we continuously evaluate the new employee's performance, fit, and overall contribution to the team and the University of British Columbia. This stage allows both the newcomer and our organization to align expectations, assess fit, and confirm that the decision to work together is mutually beneficial.

Visit the **Staff Performance Conversations** page or our **HR website** for more information.

UBC Human Resources

600 - 6190 Agronomy Road
Vancouver, BC Canada
V6T 1Z3

To reach an HR Representative, contact us
or visit us at hr.ubc.ca