

# HIRING MANAGER'S CHECKLIST





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## OVERVIEW

This checklist, along with your Component's policies, will serve as a guide to aid you through the hiring process. These are general guidelines – not all steps will apply in all cases and not all steps are detailed here. There may be some steps unique to your Component. This checklist is designed to get you thinking about the process: preplanning, approvals, funding and other actions you'll need to take throughout the hiring process. Depending on your experience with civilian hiring in the federal government, the checklist will assist you with thought-provoking questions, aid you in completing your request to hire and prepare you for your conversation with your HR professional. The intent of this checklist is NOT to turn you into an HR specialist; it is to provide you with a better understanding of your role and accountability in the hiring process and to assist you with preplanning actions that will help reduce the overall time to hire. Reaching out to your Human Resources (HR) professional will be vital throughout the process.

The information in the checklist builds upon the information contained in the "Four Key Steps of the Hiring Process" pamphlet, and breaks it down into more detailed steps. Throughout this guide, you'll notice links to tip sheets for more detailed guidance on specific topics. Use this guide to make notes and check off the steps as you proceed through the process for a particular hiring action. This is your working document; you're not required to submit it to anyone or even keep it as a matter of record.

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## PHASE I : PLANNING

### A. REVIEW YOUR STRATEGIC WORKFORCE PLAN

#### IDENTIFY THE HIRING TIMELINE

- \_\_\_\_\_ When does the job need to be filled?
- \_\_\_\_\_ If an individual job announcement is needed, how long will the job announcement be open?
- \_\_\_\_\_ How much lead time is required to complete the hiring process and get the employee on board?
- \_\_\_\_\_ When does the Request for Personnel Action (RPA) need to be submitted to get an employee on board by the desired fill date?

#### REVIEW THE POSITION DESCRIPTION & VALIDATE THE POSITION

- \_\_\_\_\_ Does a vacancy exist?
- \_\_\_\_\_ Is it a new or existing position?
- \_\_\_\_\_ If new, has the position been approved at all appropriate levels, including a compensation or position management review board if necessary, and is it part of your manning document?
- \_\_\_\_\_ Is it a centrally managed position?
- \_\_\_\_\_ Is this position covered by a bargaining unit and/or local merit promotion instruction or implementing guidance?  
*If so, your recruitment efforts might be impacted; check with your HR professional.*
- \_\_\_\_\_ Does your position require a new or revised position description? Once written, is the position description accurate?  
*Make sure your position description is ready to go when the RPA is ready.*
- \_\_\_\_\_ Have you reviewed the position sensitivity designation with your HR professional and Security point-of-contact?

## PHASE I : PLANNING

### A. REVIEW YOUR STRATEGIC WORKFORCE PLAN

#### ASSESS STRATEGIC WORKFORCE PLAN

- \_\_\_\_\_ Is the position included in a Strategic Workforce Plan?
- \_\_\_\_\_ Should this position be filled at the full performance level or is it better to fill at the entry level with promotion potential?
- \_\_\_\_\_ What are the skills and competencies needed to perform the duties of this position?
- \_\_\_\_\_ Have you considered a proper work force balance for your staff?  
*Examples: Government, contractor or military staff; entry vs. journey level (full performance); etc.*

### B. IDENTIFY YOUR TALENT REQUIREMENTS

#### IDENTIFY RECRUITMENT OPTIONS & STRATEGY

- \_\_\_\_\_ In keeping with the competencies needed for this position, what applicant sources would best meet your needs?  
*Your sources may range from internal Component employees, DoD or current federal employees, to students from colleges/universities, wounded warriors, veterans, people with disabilities, military/civilian spouses or family members, individuals from OPM standing registers or any other candidate source. Keep in mind that your choice of recruitment source will affect how quickly you fill your vacancy.*

FOR MORE INFORMATION ON THIS TOPIC SEE

**HIRING OPTIONS GUIDE**

## PHASE I : PLANNING

### C. CONSIDER THE LABOR MARKET

#### IDENTIFY RECRUITING OR COMPENSATION INCENTIVES FOR QUALITY CANDIDATES

- \_\_\_\_\_ Is this a hard-to-fill position based on position requirements or location?
- \_\_\_\_\_ What might attract candidates to your job?
- \_\_\_\_\_ What are your competitors doing to attract candidates?
- \_\_\_\_\_ Can you match your competitors' salary offer?
- \_\_\_\_\_ If not, what other nonmonetary options can you offer that are also available to current employees in your organization?  
*Examples: alternative work schedule, telework, etc.*

#### DETERMINE INCENTIVE AVAILABILITY

- \_\_\_\_\_ Is your organization ready to offer special incentives or flexibilities to attract candidates?
- \_\_\_\_\_ Do you need to obtain funding approval?  
*Incentives may include student loan repayment, the 3 R's – Recruitment, Relocation and Retention Incentives, Paid Permanent Change of Station (PCS), etc.*

FOR MORE INFORMATION ON THESE TOPICS SEE

**HIRING INCENTIVES GUIDE**

#### PLAN CANDIDATE EVALUATION STRATEGY

- \_\_\_\_\_ What, if any, are your organization's policy/requirements on interviewing candidates?
- \_\_\_\_\_ Will you conduct interviews alone or by panel?
- \_\_\_\_\_ If by panel, who will be the panel members?
- \_\_\_\_\_ What questions will you ask during the interview?
- \_\_\_\_\_ What criteria will you use to assess responses to interview questions?
- \_\_\_\_\_ What types of interviews will be conducted?  
*Example: Behavioral-based*

FOR MORE INFORMATION ON THIS TOPIC SEE

**INTERVIEW GUIDELINES**

## PHASE 2 : ATTRACTING THE CANDIDATE

### A. CONFIRM RECRUITMENT REQUEST

#### INITIATE THE RECRUITMENT REQUEST

- \_\_\_\_\_ Have you initiated the recruitment request and attached all the appropriate documents?  
*Follow your HR service provider's process for including the appropriate documents, such as position description, etc.*

### B. CHOOSE THE BEST RECRUITMENT STRATEGY

#### ATTRACT QUALITY CANDIDATES TO APPLY FOR YOUR VACANCY

- \_\_\_\_\_ What have you done to help attract quality candidates to apply for your vacancy?  
*Examples: Email to your professional network, universities, functional websites, professional publications/affiliations, etc.*

#### MARKET THE JOB TO CANDIDATES

- \_\_\_\_\_ How does your organization stand out from others?
- \_\_\_\_\_ What programs/benefits does your organization offer?
- \_\_\_\_\_ Why should job candidates want to work for you?
- \_\_\_\_\_ What interesting story or significant history can you share about your organization?
- \_\_\_\_\_ What professional recognition has your organization received?

#### FINALIZE YOUR HIRING STRATEGY WITH HR

- \_\_\_\_\_ Are you prepared to discuss the estimated timeline for reaching key milestones in filling your job?  
*Once HR receives your request for recruitment, they will contact you. This is when your preplanning and preparations pay off.*
- \_\_\_\_\_ Is there a mandatory placement program for your vacancy?  
*Examples: Reemployment Priority List, and the DoD Priority Placement Program (PPP), etc. Your HR consultant will check all mandatory placement programs and inform you if there are any qualified or mandatory candidates.*

FOR MORE INFORMATION ON THIS TOPIC SEE

**PLACEMENT PROGRAMS TIP SHEET**

## PHASE 2 : ATTRACTING THE CANDIDATE

### C. USE SIMPLIFIED JOB ANNOUNCEMENT

#### DEVELOP THE JOB OPPORTUNITY ANNOUNCEMENT (JOA)

\_\_\_\_\_ Will you use a standard JOA for your recruitment?

\_\_\_\_\_ If not, who will be the primary author of the JOA?

*Examples: You, the hiring manager, HR or Subject Matter Expert (SME). In most cases HR will be the primary author with your input as an SME. In other cases, either you or another SME may be the primary author. Your HR professional will identify and advise you on the appropriate hiring options and develop the JOA if needed, including any candidate assessment criteria.*

## PHASE 3 : MAKING HIRING DECISIONS

### A. DETERMINE SCHEDULE AVAILABILITY

#### PREPARE TO EVALUATE CANDIDATES

- \_\_\_\_\_ What will be your methodology of candidate review?
- \_\_\_\_\_ Have you noted the certificate expiration date and completed your selection prior to that date?
- \_\_\_\_\_ Have you reviewed any organization policies or bargaining unit requirements for considering and evaluating candidates?  
*Candidate evaluation is accomplished by efficiently reviewing résumés, interviewing and checking references.*

#### REVIEW RÉSUMÉS

- \_\_\_\_\_ Have you set aside time for reviewing résumés and conducting interviews?
- \_\_\_\_\_ If you are using a panel, have you verified panel members' availability for résumé review and interviews (if applicable)?
- \_\_\_\_\_ Have you determined candidate schedule availability?
- \_\_\_\_\_ Based on your review of résumés, have you captured any notes or questions that you want to follow up on during the interview process?

## PHASE 3 : MAKING HIRING DECISIONS

### B. COMPLETE INTERVIEWS IN A TIMELY MANNER

#### INTERVIEW CANDIDATES

- Will you conduct interviews?  
*Unless otherwise specified in your organizations' policies, whether to interview or not is your decision. Answer the following Y/N questions to help you decide:*  
  
*Y / N Do you need to clarify the candidates' credentials or any other essential job requirements?*  
  
*Y / N Do you need to determine the candidates' competencies that are not readily identified or assessed from reviewing résumés?*  
  
*Y / N Will your candidates need an opportunity to ask questions about your job vacancy and organization to determine their fit and continued interest?*
- Have you been mindful that during interviews, candidates are evaluating you and your organization?
- Have you ensured that the candidate's experience in the interview is a good one?  
*Be mindful that quality candidates are looking at many job opportunities; making a timely decision is critical.*

FOR MORE INFORMATION ON THIS TOPIC SEE

**INTERVIEW GUIDELINES**

### B. COMPLETE INTERVIEWS IN A TIMELY MANNER

#### REVIEW REFERENCES

- Have you reviewed references?  
*References help you to get the full picture of the candidate's competencies and his or her potential fit for your organization. This step should not be bypassed.*

FOR MORE INFORMATION ON THIS TOPIC SEE

**REFERENCE CHECKING GUIDELINES**

## PHASE 3 : MAKING HIRING DECISIONS

### C. NOTIFY APPROPRIATE OFFICIALS OF YOUR DECISION

#### MAKE YOUR HIRING DECISION

- \_\_\_\_\_ To what extent do the individual's skills and experience align with the daily activities and expectations for your job?
- \_\_\_\_\_ Does the candidate possess key characteristics and work behaviors that fit your organizational environment and culture?
- \_\_\_\_\_ Have you considered alternate selectees in case your selectee declines or is unable to meet pre-employment requirements?

#### INFORM SELECTEE

- \_\_\_\_\_ Have you notified HR once your decision is made?  
*HR will let you know if you or they will make the tentative job offer per your organization's policy.*
- \_\_\_\_\_ Have you informed your selectee?  
*Remember, the offer is still referred to as tentative or contingent because there are employment requirements that your HR consultants must first check before making the final job offer.*
- \_\_\_\_\_ Did your selectee decline the offer?  
*Either move on to your next selection or return the certificate to HR and request to be contacted to discuss your next options.*

FOR MORE INFORMATION ON THIS TOPIC SEE

**TENTATIVE JOB OFFER TIP SHEET**

## **PHASE 4 : SHAPING EARLY EXPERIENCES**

### **A. PLAN FOR A SUCCESSFUL DAY ONE**

#### **PREPARE FOR NEW ARRIVAL**

- \_\_\_\_\_ Did you stay in touch with the new employee from the time the tentative job offer was extended and accepted through the conditions of employment to the time the final job offer was accepted as a commitment to join your staff?
- \_\_\_\_\_ If your selectee declines the final job offer or does not successfully complete the pre-employment process, have you discussed your options with your HR professional?
- \_\_\_\_\_ Have you arranged for the setup of the selectee's work desk and other equipment (examples: computer, telephone, etc.) he or she may need prior to his or her first day?
- \_\_\_\_\_ Have you coordinated a welcome packet, welcome letter or compiled other organizational information?
- \_\_\_\_\_ Have you taken a moment to add a personal note to the packet?

## PHASE 4 : SHAPING EARLY EXPERIENCES

### B. CULTIVATE A POSITIVE EXPERIENCE

#### COMPLETE ON THE FIRST DAY

- \_\_\_\_\_ Have you introduced your new hire to your organization?
- \_\_\_\_\_ Have you made sure the employee receives a tour of the building, the office and essential facilities?
- \_\_\_\_\_ Have you provided a staff contact list for the new employee?
- \_\_\_\_\_ Have you facilitated networking opportunities for them with individuals across your organization?
- \_\_\_\_\_ Have you made your new hire feel comfortable?  
*Example: "It's very important to me that you feel comfortable in your new job. If you have any questions, don't hesitate to come to me and ask."*
- \_\_\_\_\_ Have you considered placing a welcome note on the new employee's desk?

#### COMPLETE WITHIN THE FIRST WEEK

- \_\_\_\_\_ Have you provided your new hire with a clear explanation of their first assignment?
- \_\_\_\_\_ Have you introduced key stakeholders, senior leaders, co-workers and other managers to the new employee?
- \_\_\_\_\_ Have you connected your new employee with your HR representative for the formal Oath of Office, completion of paperwork and security requirements and explanation of benefits and agency policies?
- \_\_\_\_\_ Have you provided information about the organization, including the organization chart, and gone over everyday aspects of the job?
- \_\_\_\_\_ Have you considered planning a lunch with the new hire and co-workers?
- \_\_\_\_\_ Have you checked in with the new employee to see how he or she has settled into the office?

## PHASE 4 : SHAPING EARLY EXPERIENCES

### B. CULTIVATE A POSITIVE EXPERIENCE

#### COMPLETE WITHIN THE FIRST 90 DAYS

- \_\_\_\_\_ Have you ensured your new hire clearly understands his or her performance objectives and how he or she links to the mission of your organization?
- \_\_\_\_\_ Have you ensured he or she understands how he or she will be measured?
- \_\_\_\_\_ Have you provided early informal reviews to put your new hire on track with feedback he or she can use to optimize his or her performance?

#### COMPLETE WITHIN THE SIX MONTHS

- \_\_\_\_\_ Have you provided employee with performance feedback on a regular basis (after the first 90 days) in a supportive manner, applauding good work and progress and addressing any “problems”?  
*Employees benefit from knowing they are on the right path in aligning their work effort to the organization’s mission.*

### C. STAY INFORMED AND INVOLVED

#### KEEP AN OPEN DOOR

- \_\_\_\_\_ Have you discussed early experiences with the new employee and offered to answer questions?  
*What you do during the first few months of your new hires’ employment is critical to integrating them into your organization and maximizing their productivity.*

#### MAINTAIN RECORDKEEPING

- \_\_\_\_\_ Have you kept all notes taken during the hiring process?  
*Keep copies of your notes used to evaluate the candidates, rank the candidates, review records and conduct your interviews for a minimum of two years from the new hire’s start date in case of a third-party review.*