

DETE

MERIT

SELECTION

POLICY

AND

PROCEDURES

SCHOOL SECTOR 1997



**DEPARTMENT OF EDUCATION
TRAINING AND EMPLOYMENT**

FOREWORD

Selection of staff on merit is essential to the delivery of quality education in our state and significantly impacts on the learning outcomes of our students. Merit based selection is widely acknowledged as the key process for selecting the best person for the job. It is a requirement embodied in the *Public Sector Management Act 1995* and the *Equal Opportunity Act 1984 (SA)*.

The Department of Education, Training and Employment in meeting its commitment to such legislation has reviewed the Merit Selection Policy and Procedures to ensure their effective application in the identification of the best applicants. The principles of merit require that an applicant's skills, abilities, knowledge and experience are objectively assessed in relation to the requirements of the job. For the merit principle to be upheld selection decisions must be made by technically competent people, acting ethically.

The key changes incorporated in the new Merit Selection Policy and Procedures are the result of extensive consultation. The changes aim to provide appropriate expertise on selection panels and require referees to be an essential part of the process to contribute to the quality control of the Department's Merit Selection Policy. This policy incorporates the procedures required for internally advertised positions and those advertised across the system. Other changes have been made to reduce the time expended by applicants and panellists without compromising the quality or effectiveness of the selection process. The involvement of parents in the selection of principals has been maintained as an integral part of the policy and procedures.

The Merit Selection Policy and Procedures apply to officers of the teaching service and School Services Officer, Aboriginal Education Worker and Government Services Employee appointments within DETE (School Sector). In implementing the provisions of the Public Sector Management Act appointments of these employees require differing approval processes and delegations. These will be published at a later date to provide for, as far as possible, consistent merit selection procedures across the Department.

The Merit Selection Policy and Procedures encompass and firmly consolidate the application of merit in the selection of staff within the Department of Education, Training and Employment (School Sector). They will contribute significantly in supporting selection panels to identify highly skilled employees, capable of meeting the challenges facing education and responding to the educational needs of the state.

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INTRODUCTION

Basic principles of selection

The Department of Education, Training and Employment is bound by the provisions of the *Public Sector Management Act 1995* as they apply to all public sector employees.

Part 2 General Public Sector Aims and Standards, Personnel management standards, Section 5 states:

In personnel management, public sector agencies will:

- a) base all selection decisions on a proper assessment of merit; and*
- b) treat employees fairly and consistently and not subject employees to arbitrary or capricious administrative decisions; and*
- c) prevent unlawful discrimination against employees or persons seeking employment in the public sector on the ground of sex, sexuality, marital status, pregnancy, race, physical impairment or any other ground and ensure that no form of unjustifiable discrimination is exercised against employees or persons seeking employment in the public sector; and*
- d) use diversity in their workforces to advantage and afford employees equal opportunities to secure promotion and advancement in their employment; and*
- e) afford employees reasonable avenues of redress against improper or unreasonable administrative decisions; and*
- f) provide safe and healthy working conditions; and*
- g) prevent nepotism and patronage.*

Under provision 6(f) *Employee conduct standards*, public sector employees are expected to observe all relevant legislative requirements.

To avoid nepotism and patronage or the appearance thereof, it is important there is no conflict of interest in selection processes due to the nature of the relationship between individual panellists and applicants.

Selection on merit requires an assessment of the abilities, skills, qualifications, knowledge, experience,

characteristics and personal qualities which are relevant to the duties of a specific position. Merit is defined in the *Public Sector Management Act 1995* and is described and discussed in detail below.

Non discriminatory selection

The Department of Education, Training and Employment must also adhere to the provisions of the *Equal Opportunity Act 1984 (SA)* and related federal legislation.

In the context of selection, discrimination occurs when a person receives less favourable treatment on the grounds of sex, sexuality, marital status, pregnancy, age, race or impairment, or on the basis of a characteristic (or presumed characteristic) of these grounds.

Setting an unreasonable requirement can also amount to unlawful discrimination, where more members of one sex (or race etc.) are able to meet that requirement, than members of the opposite sex (or another race etc) and when that requirement is not reasonable in the circumstances of the case.

Such less favourable treatment can occur at any stage of a selection process from the placement of an advertisement, the manner in which an interview is conducted, to the determination of recommendations.

Discrimination in selection can be blatant and overt but more often it is subtle and unintended. Both forms are nevertheless unlawful and steps must be taken to ensure they do not occur.

Application of the Merit Principle to Selection Processes

The Department of Education, Training and Employment is required to base all selection on merit as defined in Part 1 of the *Public Sector Management Act 1995*.

Merit in relation to selection processes for the filling of positions means:

- (a) the extent to which each of the applicants has abilities, aptitude, skills, qualifications, knowledge, experience (including community experience) and personal qualities relevant to the carrying out of the duties in question; and

(b) if relevant:

- (i) the manner in which each of the applicants carried out any previous employment or occupational duties or functions; and
- (ii) the extent to which each of the applicants has potential for development.

A proper assessment of merit therefore needs to be based on the following:

- properly prepared job and person specifications which truly reflect the requirements of the job
- processes which fairly, accurately and validly measure the relevant skills, abilities, knowledge, experience and qualifications of applicants, so that proper judgements can be made about the comparable attributes of each candidate.

Use of the Merit Definition *Merit definition part (a)*

Abilities, aptitudes and skills

The meanings of these terms overlap but generally they mean the capacity, ability and facility to do the tasks required in order to achieve the outcomes of the position. On a person specification terms such as communication skills, management ability and analytical skills could be used. Applicants with a particular ability, aptitude or skill may not have had the opportunity to use or display this.

Personal abilities are attributes that describe a person such as initiative, patience, assertiveness, sensitivity and diligence. If these are to be considered they must be relevant to the duties and included in the person specification. Since perception of such attributes is subjective and may vary with circumstances care should be taken to establish a common understanding of them within the panel and of their relevance to the duties in question. The varying cultural and gender indicators of such attributes must also be taken into account.

Qualifications and knowledge

Any qualification or knowledge must be clearly relevant to the duties. Care must be taken to ensure that these requirements are worded so as not to exclude people who may be able to carry out the duties satisfactorily after a reasonable period of familiarisation.

Experience

The breadth and variety of occupationally gained experience may be relevant in determining merit. Relevant non-occupational experience is to be taken into account in the same way as relevant occupational experience. For example, management of a voluntary or social group should be considered in the same way as management of a work group if it is relevant to the position in question.

Merit definition part (b)

Part (b) of the definition is to be used only when information about an applicant's relevant skills cannot be obtained using part (a) of the definition. This will be infrequent as there are many ways in which part (a) type information can be obtained. However where no related work experience exists the person's potential to fulfil the duties and responsibilities of the position in question may be considered. Information of this type is likely to be much less accurate and less easy to defend logically than information gathered under part (a) of the definition of merit. Selection panels are advised to concentrate on methods that give information that is direct and relevant. For example, this may involve the use of work samples.

DETE (SCHOOL SECTOR)

MERIT SELECTION

POLICY AND PROCEDURES

PART A

**(for teacher and seconded teacher
positions)**

PART A TEACHER AND SECONDED TEACHER POSITIONS

SECTION 1 ESTABLISHING THE POSITION

1.1 Defining the requirements of the position

An important part of the selection process occurs before the position is advertised by deciding on:

- the position outcomes and the related duties and responsibilities of the position
- the skills, knowledge, experience and qualifications required to achieve the position outcomes.

Within schools, job and person specifications are written by the principal (or nominee) in consultation with the Personnel Advisory Committee.

In the case of principal, deputy principal and assistant principal positions, generic job and person specifications are used. Additional requirements considered essential to reflect the specific needs of the school may be included. Additional requirements for the position of principal must be discussed with the School Council by the District Superintendent of Education before inclusion in the specifications.

Where the position is for a seconded teacher, the relevant director will ensure job and person specifications are written. These specifications must be forwarded to the Levels Committee, via the relevant Assistant Director, Personnel for classification, prior to approval for advertisement.

the job specification

The job specification is a succinct description of the position in terms of the duties and tasks to be undertaken in order to achieve clearly stated outcomes. It must also state the reporting and working relationships for the position.

the person specification

The person specification lists the skills, knowledge, experience and qualifications necessary to achieve the outcomes detailed in the job specification. Only those requirements necessary for the achievement of the stated outcomes should be listed as essential. The person specification must also state the eligibility requirements of applicants.

school context statements

School context statements are prepared in consultation with the school community and are made available to all applicants for school based leadership positions. These statements provide general information about the school, and more specific information about: the student profile, school priorities, curriculum offerings, staff profile, co-curricular activities, school facilities and where appropriate, the local community.

It is also recommended that context statements be developed and provided to applicants for non school based positions.

special measures

In identifying positions, it may be determined there is sufficient justification to invoke those sections of the *Equal Opportunity Act 1984 (SA)* which enable positions in certain circumstances to be reserved for applicants of a particular sex (viz. Section 47).

Where the circumstances are consistent with those outlined in the approved Departmental 'scheme or undertaking', in terms of the *Equal Opportunity Act 1984 (SA)*, the preference for applicants of a particular sex must be clearly indicated in defining the requirements of the position.

If the circumstances fall outside any such approved Departmental scheme or undertaking the matter must be referred to the Chief Executive via the Director, Personnel.

Once a vacancy has been approved and it is intended that the position be advertised as a Section 47 appointment, the job and person specification must be forwarded to the Manager, Equal Opportunity Unit for approval, prior to advertising. The job and person specification must include criteria specific to the scheme or undertaking.

people with disabilities

Job and person specifications should be carefully examined to ensure they are written in a way that does not discriminate against people with disabilities.

Where requirements are unreasonable they could be deemed unlawful under the provisions of the *Equal Opportunity Act 1984 (SA)*.

To ensure non discrimination in selection criteria, it is necessary for the job and person specifications to express accurately what is essential and where necessary desirable, to achieve the outcomes of the position. People with disabilities may be able to do what is required in a job, but their disability may create a difference in the way in which they do it. They should not be excluded from employment because of such differences.

1.2 Identification of positions

A school based position is identified by the principal in consultation with the Personnel Advisory Committee.

A non school based position is identified by the relevant director or nominee.

The job and person specifications for externally advertised positions must be reviewed by the Promotions Officer prior to gaining approval to advertise.

No provisions for extending tenure are available for externally advertised positions.

1.3 Approval to fill a position

The rights of teachers holding substantive leadership appointments who require placement must be considered prior to advertising any short or long term position. Vacancies with a tenure of one term or longer are forwarded to the relevant Assistant Director, Personnel for approval to advertise them internally or externally.

The relevant Assistant Director, Personnel may limit appointments to the current calendar year to protect the interests of substantive officers without permanent positions.

internally advertised positions

Internally advertised positions have a tenure of up to and including one school year and are advertised at the local site where the position is based. Internally advertised positions are only available to eligible staff working at the site (see 1.4.2).

A group of schools may request to fill internally advertised positions across a cluster. This requires approval by the relevant Assistant Director, Personnel before proceeding to advertise.

seconded teacher positions

Seconded teacher positions with a tenure of more than 6 months or 2 terms must be advertised externally.

externally advertised positions

School and non school based positions with a tenure of more than one school year will be advertised in the DETEpress and circulated to all schools and other worksites.

Seconded teacher positions of greater than 2 terms will also be advertised in the DETEpress.

Advertisements for all positions (external and internal) will include details of the position title, classification level, salary, location, term of appointment, closing date for applications and the names and telephone numbers of the contact officers from whom information and the job and person specifications are available.

1.4 Access to Positions

The principal or manager for the position will ensure that:

- the job and person specifications and any additional written information are available for all applicants from the contact officer named in the advertisement
- names and addresses of people requesting the specifications are recorded
- additional oral information is supplied carefully, accurately, consistently and fairly by the contact person.

1.4.1 Externally advertised positions

permanent, PAT, PRT, part time or TPT positions

All permanent teachers including those in PAT, PRT, part time or temporarily placed positions are able to apply for any position advertised in the DETEpress and the Notice of Vacancies issued by the Commissioner for Public Employment.

If part time teachers are nominated for positions with a higher fraction of time, their fraction of time can be increased for the tenure of the position.

contract and TRT positions

Teachers who are in contract or TRT positions may apply for positions advertised in the DETEpress if they are employed in a DETE worksite on at least one day between the date of the advertisement and the closing date for applications.

1.4.2 Internally advertised positions

part time teachers

Part time teachers who are appointed to an internally advertised leadership position have the option, if the appointment can be achieved within the staff target, of increasing their time for the duration of the appointment.

A part time appointee undertakes the whole of the leadership role and the appropriate teaching responsibilities. Another teacher would fulfil the remaining teaching component.

Part time teachers appointed to principal vacancies are required to increase to full time for the tenure of the position.

teachers in PAT positions

Teachers who are in PAT positions may apply for positions advertised internally. If a teacher is nominated for a position that extends beyond the tenure of the original appointment to the school, the appointment will not be automatically extended.

contract positions

Teachers who are in contract positions may apply for internally advertised vacancies. If a teacher is nominated for a position that extends beyond the tenure of the original contract to the school, the appointment will not be automatically extended.

internally advertised positions to commence in the following year

School based leadership positions which are internally advertised with a tenure beginning in the following school year can only be filled by staff with a guaranteed placement at the worksite at the beginning of that school year.

Schools may choose to wait until the beginning of the following school year to advertise internal acting leadership positions. This would enable newly appointed staff to apply for these positions. However, this is a school based decision.

Teachers who are currently in PAT, TPT or contract positions in a school are not guaranteed a teaching position in that school for the following year. These teachers cannot apply for leadership positions being advertised internally with a commencement date during the following year.

1.4.3 Other considerations

part time teachers and principal positions

Part time teachers are eligible to be appointed to the position of principal. However, they will be required to increase to full time for the duration of the appointment.

part time teachers sharing leadership positions

Part time teachers can apply to fill a position by sharing the appointment. This applies to all school based positions except that of principal and also to seconded teacher positions by negotiation with the appropriate director.

Such appointments can only be made with the consent of both applicants. Part time teachers on fractional time which adds up to a maximum of 1.0 FTE who are applying for a position on a shared basis must write separate applications. They are interviewed separately and referee comments are sought separately. Each applicant must meet the requirements of the person specification. In making the recommendation, the selection panel must determine that the team can best achieve the outcomes required of the appointment.

SECTION 2 THE SELECTION PANEL

Panel members are trained and chosen for their relevant expertise within the range of skills required for a selection panel. Each panel will have skills in selection, equal opportunity principles and practices, relevant specialist expertise and knowledge of the duties in question.

The quality and precision of the selection process is improved if the panel members have a broad range of backgrounds and experiences. In this context, it is particularly important to ensure that the panel aims for cultural inclusivity and is gender representative in order to reflect the diversity of the community and workforce.

2.1 Gender representation

This is an essential requirement for all panels for externally advertised positions. Approval to vary this requirement must be sought in writing from the Director, Personnel. In establishing panels for externally advertised positions, the SAIT nominee is appointed prior to the peer panellist. Gender representation will be achieved (where applicable) through the appointment of the peer panellist.

For internally advertised positions gender representation on panels is recommended, where possible.

2.2 Schools with significant enrolments of Aboriginal or Torres Strait Islander students, students from non English speaking backgrounds or students with disabilities

For schools with significant enrolments of students who are Aboriginal or Torres Strait Islander, from non English speaking backgrounds or with disabilities, the selection panel will, wherever possible, contain at least one person with recognised expertise in relation to the educational needs of these students. Similarly, where a position advertised in a non school site requires an understanding of the needs of these students, the above requirement will also apply.

The expertise required in all of the above instances can be reflected in any of the positions held by panellists.

2.3 Anangu schools

The Anangu schools have specific arrangements for the selection of staff in their schools. The selection panel will comprise the required panellists for the various positions as detailed in section 2.6. However, these panels will also

include Anangu representation from the Pitjantjatjara Yankunytjatjara Education Committee. Applicants for positions in an Anangu school should check with the Manager, Anangu Education Services for information on the selection process for the relevant position.

2.4 Establishing the panel

principal positions

In normal circumstances for principal positions, the panel is established by the District Superintendent of Education of the District in which the position is based. The Chief Executive retains the right to nominate an alternative chairperson for a selection panel as the need arises.

other school based positions

For other school based positions a panel is established by the principal or nominee.

non school based positions including seconded teachers

In non school based sites, a panel is established by the relevant manager or nominee.

alternative panel composition

Approval to vary the composition of any panel must be obtained in writing from the Director, Personnel.

2.5 Training

All panellists are required to be trained in the selection procedures in order to participate on selection panels. This does not apply to parents or community representatives.

Training for Departmental and SAIT panellists will be provided on a regular basis.

Training for peer panellists will be provided on a needs basis according to the available pool of expertise.

Accreditation as a trained panellist will be for 5 years.

2.6 Composition of Panels

Once a panel is constituted the panellists are responsible to the chairperson. No panellist represents in any sense, an organisation, person, association or interest group. Selection must be made on the basis of merit.

2.6.1 Positions with a tenure of up to and including 2 terms or 6 months

school based positions

Appointments are managed by the principal in accordance with the guidelines detailed in Section 4, Part A.

acting principal vacancies

The deputy principal will be appointed to principal vacancies of up to and including 2 terms. Where there is no deputy principal, the District Superintendent of Education will negotiate with the Assistant Director, Personnel to fill the position for 2 terms. In all cases the rights of teachers holding substantive leadership appointments who require placement will be considered first.

non school based positions including seconded teachers

Appointments are managed by the relevant director or nominee in accordance with the principles of merit selection.

No extensions are available for these positions.

Guidelines for the filling of these positions are identified in Section 4, Part A.

2.6.2 Positions with a tenure greater than 2 terms or 6 months and up to and including one school year

There will be no provision of TRT days or associated panel costs for positions of up to one school year in length for either panellists or applicants.

school based positions

Where positions cannot be filled from within the local worksite, approval must be sought to advertise externally. It is not possible to restrict the advertisement of these positions to a district pool, unless approval has been given by the relevant Assistant Director, Personnel (see 1.3).

Positions with a tenure of greater than 2 terms or 6 months and up to and including one school year are to be advertised at the local site.

A panel is to comprise:

- principal (or nominee) as chairperson
- one trained staff representative (elected by the whole staff).

non school based positions

Where positions cannot be filled from within the local worksite, approval must be sought to advertise externally. It is not possible to restrict the advertisement of these positions to a district pool, unless approval has been given by the relevant Assistant Director, Personnel (see 1.3).

Positions with a tenure of greater than 2 terms or 6 months and up to and including one school year are to be advertised at the local site.

A panel is to comprise:

- manager/principal (or nominee) as chairperson
- one trained staff representative.

seconded teacher positions

Seconded teacher positions with a tenure greater than 2 terms or 6 months and up to and including one year are to be advertised externally in DETEpress. The panel for positions advertised within this tenure will be:

- director (or nominee) as chairperson
- a peer panellist from another worksite nominated by the Director, Personnel
- a SAIT panellist, nominated by the President, SAIT.

2.6.3 Positions with a tenure greater than one year advertised across the Department of Education, Training and Employment

TRT and travel provisions for panellists will be subject to prior approval by the relevant Assistant Director, Personnel.

principal positions

For the position of principal the panel will comprise:

- the District Superintendent of Education as chairperson (unless the Chief Executive nominates an alternative chairperson)
- a peer panellist nominated by the Director, Personnel
- a SAIT panellist nominated by the President, SAIT
- one parent nominated by the School Council of the school in which the position exists. Where schools are

amalgamating a parent from each site should be nominated by the respective School Councils.

deputy, assistant principal and coordinator positions

For the positions of deputy principal, assistant principal and coordinator the panel will comprise:

- the principal or nominee as chairperson
- a peer panellist from another worksite nominated by the Director, Personnel
- a SAIT panellist nominated by the President, SAIT.

non school based positions including seconded teachers

For these positions the panel will comprise:

- a chairperson nominated by the relevant director
- a peer panellist from another worksite nominated by the Director, Personnel.
- A SAIT panellist nominated by the President, SAIT.

2.7 Chairperson responsibilities

The chairperson is responsible for the selection process and must:

- be thoroughly familiar with merit selection procedures
- establish and guide the panel in determining the panel process
- manage the administration of all aspects of the selection process
- ensure that all panellists are familiar with merit selection policies and processes, the need for confidentiality and the implications of any breach of confidentiality
- ensure that appropriate information for potential applicants is readily available
- manage the communication of Managing Poor Performance information as provided by an applicant to the panel
- endeavour to establish an atmosphere at interview that is conducive to all interviewees' presentations

- consult with the Director, Personnel in order to resolve any disputes about procedures which may arise between panellists
- complete the panel report in consultation with the other panellists and forward recommendations to the Director, Personnel or nominee
- ensure the inclusion of minority reports, where applicable
- retain panellists' working notes made during the selection process until the position has been approved
- retain and ensure secure storage of required documentation at the worksite for a period of 2 years.

The chairperson must keep each applicant informed about the process of selection by:

- acknowledging receipt of applications
- notifying all applicants promptly with respect to shortlisting, appeal rights and the approved nomination
- notifying shortlisted applicants of the panel composition prior to the interview and non-shortlisted applicants, on request
- informing applicants clearly about the procedures to be used in interview or in other selection processes
- informing applicants about significant delays
- providing feedback to applicants, on request.

Chairpersons are advised that the selection process should be managed in such a way as to avoid unnecessary disruption to teaching programs. Panels are to be conducted in the local area as far as possible. Relocation of panels should only occur when there are substantial benefits to the panel process and where this is a cost effective option.

2.8 Peer panellist

Wherever possible, the peer panellist will have expertise relevant to the position and hold (or have held) a position at the same or similar level as the one being filled. Principal associations will provide a list of principals for inclusion on the system wide list of peer panellists.

The Director, Personnel is responsible for selecting the most appropriate peer panellist for all panels for externally advertised positions and for monitoring the use of peer panellists.

2.9 School Council panellists

Parent representatives nominated by the School Council to participate in the selection process for a principal position should refer any concerns or questions relating to the selection process in the first instance to the chairperson of the panel. Where the concerns cannot be resolved in this manner they should be referred to the Director, Personnel.

2.10 Responsibility of panellists

Panellists are expected to:

- participate in and contribute equally to all stages of the selection process including the panel report
- treat all information obtained as confidential, including after the appointment has been made. Any breach of confidentiality is improper conduct under Section 26 (1)(c) of the *Education Act 1972* and will be subject to disciplinary action
- keep notes of information gathered during the selection process and give these to the chairperson at the conclusion of the selection process
- request that the chairperson seek advice from the appropriate authority, that is, Director, Personnel or nominee in order to resolve any disputes about procedures. Where the matter cannot be resolved the peer panellist and school council nominee should consult with the Director, Personnel or nominee. The SAIT panellist should consult with the President, SAIT or nominee
- provide feedback to applicants when this duty is delegated by the chairperson.

SECTION 3 THE SELECTION PROCESS

Selection is made on the basis of information about an applicant which has been obtained from a range of sources. It is important to choose a selection process that will give useful and reliable information. A variety of methods can be used in any selection process in order to ensure that each item of the person specification is thoroughly explored.

Major sources of information are the written application, interview and referee comments (written and verbal). Referee comments are a required part of the panel process for all shortlisted applicants.

The selection process may also require applicants to perform a range of tasks relevant to the position, such as written exercises, oral presentations and problem solving exercises.

The evaluation or decision making process depends on the panel collecting information in a structured, systematic manner in order to determine which applicant meets the person specification to the highest degree and therefore is best able to achieve the outcomes described in the job specification. The panel should design the selection process to ensure that this occurs.

3.1 Written applications

all internally advertised positions

Where a written application forms part of the selection process it should not exceed 2 typed pages.

seconded teacher positions with a tenure greater than 6 months

Positions of this tenure are advertised externally in DETEpress. A written application forms part of the selection process. This application must not exceed 5 A4 typed pages in length, including a curriculum vitae. The font size used should allow for ease of communication.

all externally advertised positions with a tenure of greater than one school year

For positions with a tenure of greater than one school year, a written application is required. This application is not to exceed 5 A4 typed pages in length, including a curriculum vitae. The font size used should allow for ease of communication.

3.2 DECS Referee Statement

This clause has been deleted.

3.3 Managing Poor Performance

Applicants who are currently participating in Managing Poor Performance are required to communicate this in writing to the chairperson for the information of the panel on a separate page enclosed with their application for the position. The chairperson should ensure that factors which relate to the job and person specifications and therefore could impact on the applicant's ability to achieve the outcomes of the position are explored, where necessary, through appropriate questions at interview and to referees.

It is essential that the strictest confidentiality is maintained by all panel members in relation to an applicant's participation in Managing Poor Performance.

3.4 Late applications

Late applications can be accepted only in extenuating circumstances, such as illness or family bereavement.

Notification of a late application must be provided to the chairperson prior to the published closing date for applications. The panel decides whether a late application will be accepted on the basis of factors which caused the lateness. The period for extension is negotiated between the applicant and the chairperson. In the case of illness, a medical certificate must be provided.

Applications which are postmarked prior to the advertised closing time must be accepted. In cases when an application has been posted but is unlikely to arrive before the specified closing time, it is highly recommended that the applicant advise the chairperson of a possible delay so that appropriate arrangements can be made.

Once a panel has decided to accept a late application, it is treated in the same way as other applications.

3.5 Shortlisting process

Applicants are shortlisted according to the degree to which their applications meet the essential requirements of the person specification. The desirable requirements of the person specification are only used as a final determinant to distinguish between applicants who have met all the essential criteria to an equivalent degree.

Community activities and other responsibilities which are relevant to the person specification are given equal

consideration to those skills and abilities developed in the paid work force.

Prior to shortlisting the chairperson should ensure:

- agreement is reached by the panel on a common understanding of the requirements of the person specification
- a copy of each application is then made available to all panel members.

The basis for shortlisting:

- the initial basis for shortlisting is the information contained and verified within an application and its relevance to the person specification. The responsibility rests with applicants to present the panel with the relevant information in their applications
- all persons whose applications indicate that they meet the essential requirements should, in the first instance, be included on the shortlist. This list can be reduced to a manageable size, if necessary, by determining the degree to which candidates meet the essential and then the desirable requirements
- on the other hand, the applications alone do not always provide enough information from which to shortlist. It may be necessary in some circumstances to seek additional information through referee comments or work samples.

Additional shortlisting procedures:

- where necessary, arrangements are made to assess applicants' overseas qualifications
- any agent named by an applicant who is overseas or interstate is contacted to arrange a telephone conference if that applicant is shortlisted.

Panellists briefly record information about each candidate at each stage of the selection process. This information is used to assess applicants against the person specification. Once all the information has been obtained it is then possible to recommend applicants in order of merit.

3.6 Referees

Information from referees complements other sources of evidence available to the panel.

Each applicant must provide at least 3 referees for each position. It is expected that each applicant's site (or line) manager is named as a referee. In exceptional circumstances, an applicant may negotiate alternative referees with the Executive Director, Human Resources.

Referees may be contacted more than once, if appropriate, and at any stage of the process, including during shortlisting. Every Panel must contact at least one referee for each shortlisted applicant. Where applicants do not meet the essential minimum requirements, or are not shortlisted, the panel is not required to contact referees. Similarly, the panel is not required to seek information from all referees for any one applicant.

un-named referees

At times it may be necessary for panel members to extend their inquiries to other referees not named by the applicant in order to ensure the information is comprehensive and accurate. These people are 'un-named' referees.

'Un-named' referees may be contacted in instances where a named referee is unable to provide the relevant information or does not have a comprehensive knowledge of an applicant's relevant work performance. Where an un-named referee is identified by the panel, the applicant must be informed of the name(s) of the person(s) to be contacted. The applicant must be given the opportunity to register any concerns and where appropriate to suggest further referees. The panel must consider the concerns of the applicant in determining whom they will contact.

Referees should be advised that the substance of referee comments will be recorded in panel reports and made available to applicants on request.

When a panellist who is a named or un-named referee gives a referee comment it is to be obtained and treated in the same way as any other referee comments.

3.6.1 Guidelines for obtaining referees reports

Prior to contacting referees, the panel should prepare a set of questions based on the person specification in the light of information gained from the applicant's written application and other selection procedures which may have been used. Follow up questions may be necessary. These must be relevant to the person specification.

When telephone contact is made or an oral report is received the referee's comments should be noted and read back to check the accuracy of content and emphasis.

Where possible the same panellist should not seek reports from all the referees for a particular applicant.

It is obligatory to contact at least one referee for all shortlisted applicants. Where applicants do not meet the essential requirements the panel does not need to contact referees. It is not necessary to go to all referees for any one applicant. However, care must be taken to ensure that decisions about managing referee checks are consistent and equitable.

It is important to substantiate information provided by the applicant especially when this information is significant in the final decision.

In cases where conflicting information is provided by referees this should be further explored by the panel. This is particularly important when the referee has been objected to by the applicant. Great care should be taken in evaluating such information in the decision making process.

3.7 Interviews

Once shortlisting has been completed, the panel must determine whether or not to conduct interviews. Either all shortlisted applicants or no shortlisted applicants are to be interviewed. Where shortlisted applicants are required for interview they should be given adequate notice prior to required attendance. Factors such as distance, interview complexity and special needs should be taken into account by the panel when scheduling interviews for applicants. If an applicant is unable to attend the interview, the panel may reschedule on the basis of each individual case.

If an applicant is unable to attend an interview on medical grounds an alternative time must be arranged. A medical certificate is required. An extension of time is negotiated between the applicant and the chairperson. Undue delays may require the panel to seek information from other sources, rather than rely on an interview.

Similarly, if an applicant is unable to attend an interview due to other extenuating circumstances such as family bereavement an alternative time may be negotiated between the chairperson and the applicant.

3.7.1 Guidelines for interviews

Panels should ensure that:

- the interview is held in a location which is private
- special requirements for applicants with disabilities are accommodated
- a list of questions based on the person specification and information already gathered during the selection process is prepared prior to the interview
- the same or similar lead questions are asked of each candidate
- any follow-up questions are related to the lead questions
- the time frame for the interview is made clear to all shortlisted applicants
- notes are taken during the interview to be used in the final evaluation of information obtained during the process.

3.8 Prior Knowledge

Prior knowledge is information held by a panellist which is directly relevant to an applicant's ability to meet the requirements of the person specification. If a panellist believes this would impact adversely on the individual's ability to achieve the desired outcomes of the position then this knowledge may be discussed confidentially with the chairperson.

It is the chairperson's responsibility to determine whether action is required. The prior knowledge should be clarified through appropriate questions either during the interview, with referees or by other selection methods being used by the panel.

A panellist may become a referee by agreement with the chairperson. In the case of a panellist being consulted as an un-named referee, an applicant has the right to comment and nominate a further referee, who must be contacted. An applicant must be informed in the event of any un-named referees being consulted.

To avoid nepotism and patronage or the appearance thereof, it is important there is no conflict of interest in selection processes due to the nature of the relationship between

individual panellists and applicants. (See Introduction - Basic principles of selection.)

3.9 Determining recommendations

The evaluation or decision making process depends on the panel's deliberate collection of information in a structured, systematic manner and then evaluation of this information against a predetermined set of criteria - the person specification. The panel should design the selection process to ensure that this occurs.

During all stages of data collection, panellists should focus on the extent to which applicants meet the criteria being evaluated. Panellists should also consciously attempt to suspend judgement on the relative merits of applicants until all information has been gathered. Panellists will of course gain impressions of candidates during interview, and these should be documented in the interview summaries. However, it is important that such impressions be confirmed by other sources such as referee comments or work samples.

Following the interview the panel should decide which of the criteria require exploration or confirmation. Information gained from referees should be considered and recorded with information from other sources.

At any time during the selection process, it may be decided not to proceed with the further assessment of one or more candidates because they do not meet certain requirements as well as other candidates. This is a legitimate action as long as the panel believes that sufficient justification exists for this decision.

In the decision making process, each panellist should independently rank candidates in order of merit on the basis of all information collected. Panellists should then discuss reasons for any differences in order of merit and make every effort to obtain a consensus decision. If this is not possible, a minority report may be submitted with the panel report setting out clearly the reasons for disagreement.

During the decision making process panellists should provide clarification of their views as logically as possible, using evidence based on the information gathered. There should be no pressure on panellists to change their views in accordance with those of more vocal or forceful panellists. Any initial agreement should be viewed as open to change, and discussed to ensure that people have arrived at similar

conclusions for the same basic reasons or for complementary reasons.

A written record of the decisions made by the panel and the reasons for these decisions is kept to provide the basis for the panel report and feedback to applicants.

3.10 Panel Reports

The panel is required to forward a panel report for approval to the Director, Personnel or nominee. All panellists are to be involved in determining the content of the panel report and the recommendations. These must be based on the degree to which each applicant has met the requirements of the person specification and demonstrates the ability to achieve the outcomes of the position.

The recommendation is to be a group decision based on the assessments made of each applicant's skills, knowledge and experience when compared with the person specification and other applicants.

The panel report should include the following information:

- the details of the vacancy, panellists and selection procedures
- names of applicants not shortlisted and reasons for these decisions
- comments on all shortlisted applicants in terms of the person specification
- summaries of referee comments for individual applicants (where applicable)
- recommendation and reasons
- comparative report (where applicable)
- minority report (where applicable).

The Director, Personnel may instruct the panel to reconsider the panel report and its recommendations if the process and documentation appear to be unsatisfactory.

minority report

Where a panellist disagrees with the recommendation and the ability of the applicant to perform the role, a minority report must be submitted with the panel report.

The minority report must detail the reasons for disagreement. This report will be considered with the panel report, prior to any decision being made regarding an appointment.

storage of panel records

All panel reports must be stored confidentially at the worksite by the chairperson for a 2 year period.

The working notes collected by the chairperson once a panel has reached a decision should be destroyed when the recommendation has been approved.

all internally advertised positions with a tenure of less than 6 months or 2 terms

For all positions with this tenure the following documentation must be forwarded to the Director, Personnel or nominee:

- managerial appointment report proforma
- a completed higher duty allowance form
- selection panel data sheet (ED 249).

all internally advertised positions with a tenure of greater than 2 terms up to and including one year

For all positions of this tenure the following documentation must be forwarded to the Director, Personnel or nominee:

- panel report summary sheet signed by both panellists
- a completed higher duty allowance form
- selection panel data sheet (ED 249)
- minority report (where applicable).

all externally advertised positions

For all externally advertised positions the following documentation must be forwarded to the Director, Personnel or nominee:

- the full panel report signed by all panellists
- a selection panel data sheet (ED249)
- a completed higher duty allowance form
- minority report (where applicable)

- a copy of the appeal rights proforma sent to all applicants.

3.11 Life of recommendations

Recommendations for externally advertised positions will remain active for 12 months. All recommended applicants must meet the requirements of the person specification. Other recommended applicants may be accessed in priority order if the position becomes vacant during the 12 month period.

3.12 Where no nomination is made

If a panel cannot recommend a suitable applicant, and the panel report has been approved by the Director, Personnel or nominee, the selection process is considered to be complete. All applicants must be advised of the outcome of the selection process. In cases where a position is to be re-advertised limited feedback is available on request to applicants. This feedback is confined to identifying the requirements of the person specification which were not met to a satisfactory degree. In cases where the position is not approved for re-advertisement the normal provisions for feedback to applicants apply (see 3.15).

3.13 Re-advertising

Re-advertisement of positions must be approved by the Director, Personnel or nominee. The advertisement and the job and person specifications should be checked by the principal or manager and revised if necessary. Applicants for the original position should be advised of the reasons for re-advertising and whether they need to make a new application.

Where a position is not approved for re-advertisement the Director, Personnel or nominee may appoint to the position for a maximum of 12 months or one school year, where no nomination can be made. These positions cannot be extended. A list of personnel who have been recommended for externally advertised positions will be retained by the Promotions Officer for the Director, Personnel to access in the event of a short term appointment up to and including 12 months.

3.14 Appeal provisions

Applicants for Education Act (Section 15) positions with a tenure of greater than 12 months may lodge a formal appeal

against serious irregularities in the process which may have affected the outcome.

In the case of positions of up to and including 12 months applicants who believe a serious irregularity in the selection process has occurred should lodge a complaint promptly with the Director, Personnel.

intent to appeal

Notification of intent to appeal must be communicated to the relevant Assistant Director, Personnel within 3 working days (including during school vacation periods) of receiving notification from a chairperson that a nomination has been made.

lodging an appeal

Applicants have a total of 5 working days (inclusive of the 3 day notification period and school vacation periods) to submit their appeal in writing by post or fax to the relevant Assistant Director, Personnel for consideration. Where no appeal is received, the name of the nominated applicant will be communicated to all applicants once the recommendation has been approved.

3.15 Feedback to applicants

Applicants have a right to know the reasons why they were or were not selected. The chairperson of a panel must ensure all applicants are informed in writing of the outcome after the recommendation has been approved. Where written feedback is requested applicants should be provided with the part of the panel report which refers to them.

Applicants requesting feedback should contact the chairperson as soon as possible after the appointment has been approved and not later than 8 weeks after receiving notification.

In cases where the position is to be re-advertised limited feedback will be provided (see 3.12). Where the Director, Personnel deems that there has been a serious irregularity in the selection process, feedback will not be provided.

No comparative information should be provided.

3.16 Release of Successful Applicants

When a nomination for a position is approved and accepted the chairperson will contact the successful applicant's line

manager and negotiate a commencement date for the position. Consideration will be given to possible adverse effects on students, school or system programmes.

In normal circumstances successful applicants will be released to take up new appointments at the beginning of a school term.

Where significant disruption will occur, release of the successful applicant can be delayed to the beginning of the next school year. Should there be a delay in the commencement of the appointment, the end date for the position will not be altered.

SECTION 4 GUIDELINES FOR INTERNALLY ADVERTISED EDUCATION ACT VACANCIES OF UP TO AND INCLUDING 6 MONTHS OR 2 TERMS

All appointments within the public sector must be made on the basis of merit regardless of the length of tenure. The processes outlined below ensure that departmental procedures are consistent with the merit principle and at the same time are conducted in a timely manner assisting schools and other worksites to maintain programs with minimal disruption.

For school based vacancies the principal, in consultation with the Personnel Advisory Committee, will choose the most appropriate option from those listed below to appoint staff to vacancies of up to and including 6 months or 2 terms. Factors that may be considered include length of tenure, the number of staff wishing to apply for the position and the timelines involved in filling the vacancy.

OPTION 1

All eligible staff complete a proforma indicating which short term positions they would be willing to accept and the skills, knowledge and experience they would bring to the position. Teachers in PAT and contract positions who are placed at the school after the beginning of Term 1 should have the opportunity to complete the proforma as part of their induction process. Using the skills register the principal/manager selects the most appropriate match(es). A referee check is made to ensure that each candidate has the necessary skills, knowledge and experience to achieve the outcomes of the position. In the case of multiple candidates for school based positions, the principal may choose to consult with the Personnel Advisory Committee in order to determine which applicant best meets the requirements of the person specification.

OPTION 2

The principal/manager calls for a one line expression of interest and the names of 2 referees from all eligible staff. The principal/manager seeks comments from a referee for each of the applicants and makes the appointment according to which applicant best meets the requirements of the person specification.

OPTION 3

The principal/manager calls for a written application addressing a limited number of key requirements in the person specification for the particular vacancy. The principal/manager may nominate the length of the application which should not exceed 2 pages. Referee comments must be obtained to verify the skills, knowledge and experience of the shortlisted candidate(s) and may be used to distinguish between candidates who appear to meet the requirements equally in the written application. After consideration of the written application(s) and referee comments the principal/manager should select the candidate who best meets the requirements specified.

OPTION 4

The principal/manager may choose to form a panel consisting of a trained chairperson and a trained panellist elected by staff. The panel will determine the most appropriate process to be used depending on factors such as the number of applicants, the length of tenure and the timelines involved. A referee check for all shortlisted applicants is necessary to determine which applicant best meets the requirements of the person specification. The panel may choose to use other parts of the selection process such as work reports, written application or interview, as appropriate.

SUMMARY

It is important to note that whichever option is chosen the following procedures apply:

- the degree to which applicants meet the person specification must be the basis for all appointments
- job and person specifications (modified as appropriate) are made available to all eligible staff
- for school based positions the role of the Personnel Advisory Committee is to advise the principal of the most appropriate option(s) for filling internal short term vacancies
- referee comments must be sought for shortlisted candidates in order to verify that the successful candidate best meets the requirements of the person specification
- the appropriate proforma is completed for every short term vacancy and stored confidentially at the worksite by the chairperson for a period of 2 years
- appropriate documentation should be forwarded to the Director, Personnel (see 3.10).

DETE (SCHOOL SECTOR)

MERIT SELECTION

POLICY AND PROCEDURES

PART B

**(School Services Officers and
Government Services Employees)**

PART B SCHOOL SERVICES OFFICERS AND GOVERNMENT SERVICES EMPLOYEES

SECTION 1 ESTABLISHING THE POSITION

1.1 Defining the requirements of the position

An important part of the selection process occurs before the position is advertised by deciding on:

- the position outcomes and the related duties and responsibilities of the position
- the skills, knowledge, experience and qualifications required to achieve the position outcomes.

Within schools, job and person specifications are written by the principal (or nominee) in consultation with the non teaching staff. Job and person specifications are then forwarded to the relevant Assistant Director, Personnel for approval.

the job specification

The job specification is a succinct description of the position in terms of the duties and tasks to be undertaken in order to achieve clearly stated outcomes. It must also state the reporting and working relationships for the position.

the person specification

The person specification lists the skills, knowledge, experience and qualifications necessary to achieve the outcomes detailed in the job specification. Only those requirements necessary for the achievement of the stated outcomes should be listed as essential.

school context statements

School context statements are to be made available to applicants on request. These statements provide general information about the school, and more specific information about: the student profile, school priorities, curriculum offerings, staff profile, co-curricular activities, school facilities and where appropriate, the local community.

people with disabilities

Job and person specifications should be carefully examined to ensure they are written in a way that does not discriminate against people with disabilities.

To ensure non discrimination in selection criteria, it is necessary for the job and person specifications to express accurately what is essential and where necessary desirable, to achieve the outcomes of the position. People with disabilities may be able to do what is required in a job, but their disability may create a difference in the way in which they do it. They should not be excluded from employment because of such differences.

1.2 Identification of positions

Positions for school services officers and government services employees are identified by the principal in consultation with non teaching staff and other relevant staff.

1.3 Approval to fill a position

The rights of school service officers and government services employees holding permanent appointments who have no substantive placement must be considered prior to advertising positions.

vacancies of less than 15 hours

Part time employees, excluding temporary employees, within a school will be offered additional hours in the first instance where vacancies of less than 15 hours per week occur in that school. In instances where more than one staff member requests an increase in time, selection must be based on an appropriate merit selection process.

If the above fails to fill the vacancy, the additional hours are then offered to part-time employees, excluding temporary employees, in nearby schools by negotiation with the relevant Assistant Director, Personnel.

In cases where there is no applicant from the school or nearby schools, the relevant Assistant Director, Personnel should be contacted.

Where the tenure of a school services officer vacancy is less than 6 months, the principal will appoint, using one of the options outlined in Part B, Section 4.

Where the tenure of the vacancy is greater than 6 months up to and including 12 months a panel consisting of the principal or nominee and a trained panellist elected by the non teaching staff will manage the selection process.

Where the tenure of the vacancy is more than 12 months, the panel composition is the same as that for positions advertised in the Notice of Vacancies (see 2.5).

vacancies of more than 15 hours and less than 6 months

The filling of positions of more than 15 hours with a tenure of less than 6 months is negotiated with the relevant Personnel Consultant.

externally advertised positions

Under normal circumstances, these positions will appear in the Notice of Vacancies issued by the Commissioner for Public Employment.

Advertisements for all positions will include details of the position title, classification level, salary, location, term of appointment, closing date for applications and the names and telephone numbers of the contact officers from whom information and the job and person specifications are available.

1.4 Access to positions

The principal or manager for the position will ensure that:

- the job and person specifications and any additional written information are available for all applicants from the contact officer named in the advertisement
- names and addresses of people requesting the specifications are recorded
- additional oral information is supplied carefully, accurately, consistently and fairly by the contact person.

SECTION 2 THE SELECTION PANEL

Panel members are trained and chosen for their relevant expertise within the range of skills required for a selection panel. Each panel will have skills in selection, equal opportunity principles and practices, relevant specialist expertise and knowledge of the duties in question.

The quality and precision of the selection process is improved if the panel members have a broad range of backgrounds and experiences. In this context, it is particularly important to ensure that the panel aims for cultural inclusivity and is gender representative in order to reflect the diversity of the community and workforce.

2.1 Gender representation

This is an essential requirement for all panels for externally advertised positions. Approval to vary this requirement must be sought in writing from the relevant Assistant Director, Personnel.

For internally advertised positions gender representation on panels is recommended, where possible.

2.2 Anangu schools

The Anangu schools have specific arrangements for the selection of staff in their schools. Applicants for positions in an Anangu School should check with the Manager, Anangu Education Services for information on the selection process for the relevant position.

2.3 Establishing the panel

school based positions

For school based positions a panel is established by the principal or nominee.

alternative panel composition

Approval to vary the composition of any panel must be obtained in writing from the relevant Assistant Director, Personnel.

2.4 Training

All panellists are required to be trained in the selection procedures in order to participate on selection panels. Training for panellists will be provided on a regular basis according to the available pool of expertise.

Accreditation as a trained panellist will be for 5 years.

2.5 Composition of panels

Once a panel is constituted the panellists are responsible to the chairperson. No panellist represents in any sense, an organisation, person, association or interest group. Selection must be made on the basis of merit.

vacancies of less than 15 hours

Where the tenure of the vacancy is greater than 6 months up to and including 12 months a panel consisting of the principal or nominee and a trained panellist elected by the non teaching staff will manage the selection process.

Where the tenure of the vacancy is more than 12 months, the panel composition is the same as that for positions advertised in the Notice of Vacancies.

positions advertised in the Notice of Vacancies

TRT and travel provisions, where applicable, for panellists will be subject to prior approval by the relevant Assistant Director, Personnel.

For school services officer and government services employee positions the panel will comprise:

- the principal or nominee as chairperson
- a non teaching staff member elected by the non teaching staff
- a teacher elected by the teaching staff.

2.6 Chairperson responsibilities

The chairperson is responsible for the selection process and must:

- be thoroughly familiar with merit selection procedures
- establish and guide the panel in determining the panel process
- manage the administration of all aspects of the selection process
- ensure that all panellists are familiar with merit selection policies and processes, the need for confidentiality and the implications of any breach of confidentiality

- ensure that appropriate information for potential applicants is readily available
- endeavour to establish an atmosphere at interview that is conducive to all interviewees' presentations
- consult with the relevant Assistant Director, Personnel in order to resolve any disputes about procedures which may arise between panellists
- complete the panel report in consultation with the other panellists and forward recommendations to the relevant Assistant Director, Personnel
- ensure the inclusion of minority reports, where applicable
- retain panellists' working notes made during the selection process until the position has been approved
- retain and ensure secure storage of required documentation at the worksite for a period of 2 years.

The chairperson must keep each applicant informed about the process of selection by:

- acknowledging receipt of applications
- notifying all applicants promptly with respect to shortlisting and the approved nomination
- notifying shortlisted applicants of the panel composition prior to the interview and non-shortlisted applicants, on request
- informing applicants clearly about the procedures to be used in interview or in other selection processes
- informing applicants about significant delays
- providing feedback to applicants, on request.

Chairpersons are advised that the selection process should be managed in such a way as to avoid unnecessary disruption to teaching programs. Panels are to be conducted in the local area as far as possible. Relocation of panels should only occur when there are substantial benefits to the panel process and where this is a cost effective option.

2.7 Responsibility of panellists

Panellists are expected to:

- participate in and contribute equally to all stages of the selection process including the panel report
- treat all information obtained as confidential, including after the appointment has been made. Any breach of confidentiality by an employee of the Department of Education, Training and Employment will be subject to disciplinary action
- keep notes of information gathered during the selection process and give these to the chairperson at the conclusion of the selection process
- request that the chairperson seek advice from the relevant Assistant Director, Personnel in order to resolve any disputes about procedures. Where the matter cannot be resolved panellists should seek advice personally from the relevant Assistant Director, Personnel
- provide feedback to applicants when this duty is delegated by the chairperson.

SECTION 3 THE SELECTION PROCESS

Selection is made on the basis of information about an applicant which has been obtained from a range of sources. It is important to choose a selection process that will give useful and reliable information. A variety of methods can be used in any selection process in order to ensure that each item of the person specification is thoroughly explored.

Major sources of information are the written application, interview and referee comments (written and verbal). Referee comments are a required part of the panel process for all shortlisted applicants.

The selection process may also require applicants to perform a range of tasks relevant to the position, such as written exercises, oral presentations, word processing and problem solving exercises.

The evaluation or decision making process depends on the panel collecting information in a structured, systematic manner in order to determine which applicant meets the person specification to the highest degree and therefore is best able to perform the duties described in the job specification. The panel should design the selection process to ensure that this occurs.

3.1 Written applications

For school services officers and government services employees there is no page limit or format requirement for written applications.

Work reports or work samples relevant to the position can be requested. It may be appropriate to establish a relevant work based exercise for applicants to complete.

3.2 Late applications

Late applications can be accepted only in extenuating circumstances, such as illness or family bereavement.

Notification of a late application must be provided to the chairperson prior to the published closing date for applications. The panel decides whether a late application will be accepted on the basis of factors which caused the lateness. The period for extension is negotiated between the applicant and the chairperson. In the case of illness, a medical certificate must be provided.

Applications which are postmarked prior to the advertised closing time must be accepted. In cases when an application has been posted but is unlikely to arrive before the specified closing time, it is highly recommended that the applicant advise the chairperson of a possible delay so that appropriate arrangements can be made.

Once a panel has decided to accept a late application, it is treated in the same way as other applications.

3.3 Shortlisting process

Applicants are shortlisted according to the degree to which their applications meet the essential requirements of the person specification. The desirable requirements of the person specification are only used as a final determinant to distinguish between applicants who have met all the essential requirements to an equivalent degree.

Community activities and other responsibilities which are relevant to the person specification are given equal consideration to those skills and abilities developed in the paid work force.

Prior to shortlisting the chairperson should ensure:

- agreement is reached by the panel on a common understanding of the requirements of the person specification
- a copy of each application is then made available to all panel members.

The basis for shortlisting:

- the initial basis for shortlisting is the information contained and verified within an application and its relevance to the person specification. All persons whose applications indicate that they meet the essential requirements should, in the first instance, be included on the shortlist. This list can be reduced to a manageable size, if necessary, by determining the degree to which candidates meet the essential and then the desirable requirements
- on the other hand, the applications alone do not always provide enough information from which to shortlist. It may be necessary in some circumstances to seek additional information through referee reports or work samples.

Additional shortlisting procedures:

- where necessary, arrangements are made to assess applicants' overseas qualifications
- any agent named by an applicant who is overseas or interstate is contacted to arrange a telephone conference if that applicant is shortlisted and an interview is required.

Panellists briefly record information about each candidate at each stage of the selection process. This information is used to assess applicants against the person specification. Once all the information has been obtained it is then possible to recommend applicants in order of merit.

3.4 Referees

Information from referees complements other sources of evidence available to the panel.

Each applicant must provide at least 3 referees for each position. It is expected that each applicant's site (or line) manager is named as a referee. In exceptional circumstances, an applicant may negotiate alternative referees with the Executive Director, Human Resources.

Referees may be contacted more than once, if appropriate, and at any stage of the process, including during shortlisting. Every Panel must contact at least one referee for each shortlisted applicant. Where applicants do not meet the essential minimum requirements, or are not shortlisted, the panel is not required to contact referees. Similarly, the panel is not required to seek information from all referees for any one applicant.

un-named referees

At times it may be necessary for panel members to extend their inquiries to other referees not named by the applicant in order to ensure the information is comprehensive and accurate. These people are 'un-named' referees.

'Un-named' referees may be contacted in instances where a named referee is unable to provide the relevant information or does not have a comprehensive knowledge of an applicant's relevant work performance. Where an un-named referee is identified by the panel, the applicant must be informed of the name of the person to be contacted. The applicant must be given the opportunity to register any concerns and where appropriate to suggest further referees. The panel must consider the concerns of the applicant in determining whom they will contact.

Referees should be advised that the substance of referee comments will be recorded in panel reports and made available to applicants on request.

When a panellist who is a named or un-named referee gives a referee comment it is to be obtained and treated in the same way as any other referee comments.

3.4.1 Guidelines for obtaining referees reports

Prior to contacting referees, the panel should prepare a set of questions based on the person specification in the light of information gained from the applicant's written application and other selection procedures which may have been used. Follow up questions may be necessary. These must be relevant to the person specification.

When telephone contact is made or an oral report is received the referee's comments should be noted and read back to check the accuracy of content and emphasis.

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It is important to substantiate information provided by the applicant especially when this information is significant in the final decision.

In cases where conflicting information is provided by referees this should be further explored by the panel. This is particularly important when the referee has been objected to by the applicant. Great care should be taken in evaluating such information in the decision making process.

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Once shortlisting has been completed, the panel must determine whether or not to conduct interviews. Either all shortlisted applicants or no shortlisted applicants are to be interviewed. Where shortlisted applicants are required for interview they should be given adequate notice, prior to required attendance. Factors such as distance, interview complexity and special needs should be taken into account by the panel when scheduling interviews for applicants. If an applicant is unable to attend the interview, the panel may reschedule on the basis of each individual case.

If an applicant is required to attend an interview and is unable to attend on medical grounds an alternative time must be arranged. A medical certificate is required. An extension of time is negotiated between the applicant and

the chairperson. Undue delays may require the panel to seek information from other sources, rather than rely on an interview.

Similarly, if an applicant is unable to attend an interview due to other extenuating circumstances such as family bereavement an alternative time may be negotiated between the chairperson and the applicant.

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Panels should ensure that:

- the interview is held in a location which is private
- special requirements for applicants with disabilities are accommodated
- a list of questions based on the person specification and information already gathered during the selection process is prepared prior to the interview
- the same or similar lead questions are asked of each candidate
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It is the chairperson's responsibility to determine whether action is required. The prior knowledge should be clarified through appropriate questions either during the interview, with referees or by other selection methods being used by the panel.

A panellist may become a referee by agreement with the chairperson. In the case of a panellist being consulted as an

un-named referee, an applicant has the right to comment and nominate a further referee, who must be contacted. An applicant must be informed in the event of any un-named referees being consulted.

To avoid nepotism and patronage or the appearance thereof, it is important there is no conflict of interest in selection processes due to the nature of the relationship between individual panellists and applicants. (See Introduction - Basic principles of selection.)

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At any time during the selection process, it may be decided not to proceed with the further assessment of one or more candidates because they do not meet certain requirements as well as other candidates. This is a legitimate action as long as the panel believes that sufficient justification exists for this decision.

In the decision making process, each panellist should independently rank candidates in order of merit on the basis of all information collected. Panellists should then discuss reasons for any differences in order of merit and make every effort to obtain a consensus decision. If this is not possible, a minority report may be submitted with the panel report setting out clearly the reasons for disagreement.

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A written record of the decisions made by the panel and the reasons for these decisions is kept to provide the basis for the panel report and feedback to applicants.

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The panel is required to forward a panel report for approval to the relevant Assistant Director, Personnel. All panellists are to be involved in determining the content of the panel report and the recommendations. These must be based on the degree to which each applicant has met the requirements of the person specification and demonstrates the ability to achieve the outcomes of the position.

The panel report should include the following information:

- the details of the vacancy, panellists and selection procedures
- names of applicants not shortlisted and reasons for these decisions
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Where a panellist disagrees with the recommendation and the ability of the nominated applicant to perform the role, a minority report must be submitted with the panel report, detailing the reasons for disagreement. This report will be considered with the panel report, prior to any decision being made regarding an appointment.

storage of panel records

All panel reports must be stored confidentially at the worksite by the chairperson for a 2 year period.

The working notes collected by the chairperson once the panel has reached a decision should be destroyed when the recommendation has been approved.

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If a panel cannot recommend a suitable applicant, and the panel report has been approved by the relevant Assistant Director, Personnel or nominee, the selection process is considered to be complete. All applicants must be advised of the outcome of the selection process. In cases where a position is to be re-advertised limited feedback is available on request to applicants. This feedback is confined to identifying the requirements of the person specification which were not met to a satisfactory degree. In cases where the position is not approved for re-advertisement, the usual provisions for feedback apply (see 3.12).

3.10 Re-advertising

Re-advertisement of positions must be approved by the relevant Assistant Director, Personnel or nominee. The advertisement and the job and person specifications should be checked by the principal or manager and revised if necessary. Applicants for the original position should be advised of the reasons for re-advertising and whether they need to make a new application.

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Where an applicant believes a serious irregularity in the selection process has occurred, a complaint should be lodged promptly with the relevant Assistant Director, Personnel.

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Applicants have a right to know the reasons why they were or were not selected. The chairperson of a panel must ensure all applicants are informed in writing of the outcome after the recommendation has been approved. Where written feedback is requested applicants should be provided with the part of the panel report which refers to them.

Applicants requesting feedback should contact the chairperson as soon as possible after the appointment has been approved and not later than 8 weeks after receiving notification. In cases where the position is to be re-advertised limited feedback will be provided (see 3.9).

Where the relevant Assistant Director, Personnel deems that there has been a serious irregularity in the selection process, feedback will not be provided.

No comparative information should be provided.

3.13 Release of successful applicants

When a nomination for a position is approved and accepted the chairperson will contact the successful applicant's line manager and negotiate a commencement date for the position. Consideration will be given to possible adverse effects on students, school or system programs.

SECTION 4 GUIDELINES FOR SCHOOL SERVICES OFFICER VACANCIES OF LESS THAN 15 HOURS WITH A TENURE OF 2 TERMS OR LESS

All appointments within the public sector must be made on the basis of merit regardless of the length of tenure. The processes outlined below ensure that departmental procedures are consistent with the merit principle and at the same time are conducted in a timely manner assisting schools and other worksites to maintain programs with minimal disruption.

For school based vacancies the principal in consultation with non teaching staff will choose the most appropriate option from those listed below to appoint staff to vacancies of less than 15 hours with a tenure of 2 terms or less. Factors that may be considered include length of tenure, the number of staff wishing to apply for the position and the timelines involved in filling the vacancy.

OPTION 1

The principal/manager calls for a one line expression of interest and the names of 2 referees from all eligible staff. The principal/manager seeks comments from a referee for each of the applicants and makes the appointment according to which applicant best meets the requirements of the person specification.

OPTION 2

The principal/manager calls for a written application addressing a limited number of key requirements in the person specification for the particular vacancy. The principal/manager may nominate the length of the application which should not exceed 2 pages. Referee comments must be obtained to verify the skills, knowledge and experience of the shortlisted candidate(s) and may be used to distinguish between candidates who appear to meet the requirements equally in the written application. After consideration of the written application(s) and referee comments the principal/manager should select the candidate who best meets the requirements specified.

OPTION 3

The principal/manager may choose to form a panel consisting of a trained chairperson and a trained panellist elected by non teaching staff. The panel will determine the most appropriate process to be used depending on factors such as the number of applicants, the length of tenure and the timelines involved. A referee check for all shortlisted applicants is necessary to determine which applicant best meets the requirements of the person specification. The panel may choose to use other parts of the selection process such as work reports, written application or interview, as appropriate.

SUMMARY

It is important to note that whichever option is chosen the following procedures apply:

- the degree to which applicants meet the person specification must be the basis for all appointments

- job and person specifications (modified as appropriate) are made available to all eligible staff
- the principal should consult with non teaching staff regarding the most appropriate option(s) for filling internal short term vacancies
- referee comments must be sought for shortlisted candidates in order to verify that the successful candidate best meets the requirements of the person specification
- the appropriate proforma is completed for every short term vacancy and stored confidentially at the worksite by the chairperson for a period of 2 years
- appropriate documentation should be forwarded to the relevant Assistant Director, Personnel.

DETE (SCHOOL SECTOR)

MERIT SELECTION

POLICY AND PROCEDURES

PART C

(Aboriginal Education Workers)

PART C ABORIGINAL EDUCATION WORKERS

SECTION 1 ESTABLISHING THE POSITION

1.1 Defining the requirements of the position

An important part of the selection process occurs before the position is advertised by deciding on:

- the position outcomes and the related duties and responsibilities of the position
- the skills, knowledge, experience and qualifications required to achieve the position outcomes.

Job and person specifications for Aboriginal Education Worker positions must be authorised by the State Aboriginal Education Worker Manager. Any variations to the job and person specifications must be negotiated with the State Aboriginal Education Worker Manager.

the job specification

The job specification is a succinct description of the position in terms of the duties and tasks to be undertaken. It must also state the reporting and working relationships for the position.

the person specification

The person specification lists the skills, knowledge, experience and qualifications necessary to perform the duties detailed in the job specification. Only those requirements necessary for the performance of the duties should be listed as essential.

school context statements

School context statements are to be made available to applicants on request. These statements provide general information about the school, and more specific information about: the student profile, school priorities, curriculum offerings, staff profile, co-curricular activities, school facilities and where appropriate, the local community.

people with disabilities

Job and person specifications should be carefully examined to ensure they are written in a way that does not discriminate against people with disabilities.

To ensure non discrimination in selection criteria, it is necessary for the job and person specifications to express accurately what is essential and where necessary desirable, to achieve the outcomes of the position. People with disabilities may be able to do what is required in a job, but their disability may create a difference in the way in which they do it. They should not be excluded from employment because of such differences.

1.2 Identification of positions

Submissions for Aboriginal Education Worker positions are forwarded to the State Aboriginal Education Worker Manager or nominee by the principal following consultation with the relevant staff.

1.3 Approval to fill a position

The rights of Aboriginal Education Workers holding permanent appointments who have no substantive placement must be considered prior to advertising positions.

requests for additional hours

All requests for additional time allocations for Aboriginal Education Workers are to be negotiated with the State Aboriginal Education Worker Manager or nominee.

requests for transfers

All requests for transfers for Aboriginal Education Workers are to be forwarded to the State Aboriginal Education Worker Manager.

short term emergency vacancies (up to one month)

The filling of short term emergency vacancies with a tenure of up to one month is negotiated through the State Aboriginal Education Worker Manager or nominee.

externally advertised positions

Under normal circumstances, positions approved for external advertisement will appear in the Notice of Vacancies issued by the Commissioner for Public Employment.

Advertisements for all positions will include details of the position title, classification level, salary, location, term of appointment, closing date for applications and the names and telephone numbers of the contact officers from whom information and the job and person specifications are available.

1.4 Access to positions

The principal or manager for the position will ensure that:

- the job and person specifications and any additional written information are available for all applicants from the contact officer named in the advertisement
- names and addresses of people requesting the specifications are recorded
- additional oral information is supplied carefully, accurately, consistently and fairly by the contact person.

SECTION 2 THE SELECTION PANEL

Panel members are trained and chosen for their relevant expertise within the range of skills required for a selection panel. Each panel will have skills in selection, equal opportunity principles and practices, relevant specialist expertise and knowledge of the duties in question.

The quality and precision of the selection process is improved if the panel members have a broad range of backgrounds and experiences. In this context, it is particularly important to ensure that the panel aims for cultural inclusivity and is gender representative in order to reflect the diversity of the community and workforce.

2.1 Gender representation

This is an essential requirement for all panels for externally advertised positions. Approval to vary this requirement must be sought in writing from the relevant Assistant Director, Personnel.

2.2 Anangu schools The Anangu schools have specific arrangements for the selection of staff in their schools. Applicants for positions in an Anangu school should check with the Manager, Anangu Education Services for information on the selection process for the relevant position.

2.3 Establishing the panel

school based positions

For school based positions a panel is established by the Aboriginal Education Worker Regional Coordinator or principal.

alternative panel composition

Approval to vary the composition of any panel must be obtained in writing from the relevant Assistant Director, Personnel.

2.4 Training

Chairpersons and peer panellists are required to be trained in the selection procedures in order to participate on selection panels for Aboriginal Education Worker positions.

Training for panellists will be provided on a regular basis according to the available pool of expertise.

Accreditation as a trained panellist will be for 5 years.

2.5 Composition of panels

Once a panel is constituted the panellists are responsible to the chairperson. No panellist represents in any sense, an organisation, person, association or interest group. Selection must be made on the basis of merit.

2.6 Positions advertised across the Department of Education, Training and Employment in the Notice of Vacancies

TRT and travel provisions for panellists will be subject to prior approval by the relevant Assistant Director, Personnel.

For Aboriginal Education Worker positions the panel will comprise:

- the Aboriginal Education Worker Regional Coordinator or principal/nominee as chairperson
- a peer panellist
- a client

The client may be a community or staff representative. The participation of the client on the panel is negotiated by the chairperson.

2.7 Chairperson responsibilities

The chairperson is responsible for the selection process and must:

- be thoroughly familiar with merit selection procedures
- establish and guide the panel in determining the panel process
- manage the administration of all aspects of the selection process
- ensure that all panellists are familiar with merit selection policies and processes, the need for confidentiality and the implications of any breach of confidentiality
- ensure that appropriate information for potential applicants is readily available
- endeavour to establish an atmosphere at interview that is conducive to all interviewees' presentations
- consult with the relevant Assistant Director, Personnel in order to resolve any disputes about procedures which may arise between panellists

- complete the panel report in consultation with the other panellists and forward recommendations to the relevant Assistant Director, Personnel
- ensure the inclusion of minority reports, where applicable
- retain panellists' working notes made during the selection process until the position has been approved
- retain and ensure secure storage of required documentation at the worksite for a period of 2 years.

The chairperson must keep each applicant informed about the process of selection by:

- acknowledging receipt of applications
- notifying all applicants promptly with respect to shortlisting and the approved nomination
- notifying shortlisted applicants of the panel composition prior to the interview and non-shortlisted applicants, on request
- informing applicants clearly about the procedures to be used in interview or in other selection processes
- informing applicants about significant delays
- providing feedback to applicants, on request.

Chairpersons are advised that the selection process should be managed in such a way as to avoid unnecessary disruption to teaching programs. Panels are to be conducted in the local area as far as possible. Relocation of panels should only occur when there are substantial benefits to the panel process and where this is a cost effective option.

2.8 Responsibility of panellists

Panellists are expected to:

- participate in and contribute equally to all stages of the selection process including the panel report
- treat all information obtained as confidential, including after the appointment has been made. Any breach of confidentiality by an employee of the Department of Education, Training and Employment will be subject to disciplinary action

- keep notes of information gathered during the selection process and give these to the chairperson at the conclusion of the selection process
- request that the chairperson seek advice from the relevant Assistant Director, Personnel in order to resolve any disputes about procedures. Where the matter cannot be resolved the peer panellist or client should seek advice personally from the relevant Assistant Director, Personnel
- provide feedback to applicants when this duty is delegated by the chairperson.

SECTION 3 THE SELECTION PROCESS

Selection is made on the basis of information about an applicant which has been obtained from a range of sources. It is important to choose a selection process that will give useful and reliable information. A variety of methods can be used in any selection process in order to ensure that each item of the person specification is thoroughly explored.

Major sources of information are the written application, interview and referee comments (written and verbal). Referee comments are a required part of the panel process for all shortlisted applicants.

The selection process may also require applicants to perform a range of tasks relevant to the position, such as written exercises, oral presentations and problem solving exercises.

The evaluation or decision making process depends on the panel collecting information in a structured, systematic manner in order to determine which applicant meets the person specification to the highest degree and therefore is best able to perform the duties described in the job specification. The panel should design the selection process to ensure that this occurs.

3.1 Written applications

For Aboriginal Education Workers there is no page limit or format requirement for written applications.

Work reports or work samples relevant to the position can be requested. It may be appropriate to establish a relevant work based exercise for applicants to complete.

3.2 Late applications

Late applications can be accepted only in extenuating circumstances, such as illness or family bereavement.

Notification of a late application must be provided to the chairperson prior to the published closing date for applications. The panel decides whether a late application will be accepted on the basis of factors which caused the lateness. The period for extension is negotiated between the applicant and the chairperson. In the case of illness, a medical certificate must be provided.

Applications which are postmarked prior to the advertised closing time must be accepted. In cases when an application has been posted but is unlikely to arrive before the specified closing time, it is highly recommended that the applicant advise the chairperson of a possible delay so that appropriate arrangements can be made.

Once a panel has decided to accept a late application, it is treated in the same way as other applications.

3.3 Shortlisting process

Applicants are shortlisted according to the degree to which their applications meet the essential requirements of the person specification. The desirable requirements of the person specification are only used as a final determinant to distinguish between applicants who have met all the essential requirements to an equivalent degree.

Community activities and other responsibilities which are relevant to the person specification are given equal consideration to those skills and abilities developed in the paid work force.

Prior to shortlisting the chairperson should ensure:

- agreement is reached by the panel on a common understanding of the person specifications
- a copy of each application is then made available to all panel members.

The basis for shortlisting:

- the initial basis for shortlisting is the information contained and verified within an application and its relevance to the person specification. All persons whose applications indicate that they meet the essential requirements should, in the first instance, be included on the shortlist. This list can be reduced to a manageable size, if necessary, by determining the degree to which candidates meet the essential and then the desirable requirements
- on the other hand, the applications alone do not always provide enough information from which to shortlist. It may be necessary in some circumstances to seek additional information through referee reports or work samples.

Additional shortlisting procedures:

- where necessary, arrangements are made to assess applicants' overseas qualifications
- any agent named by an applicant who is overseas or interstate is contacted to arrange a telephone conference if that applicant is shortlisted and an interview is required.

Panellists briefly record information about each candidate at each stage of the selection process. This information is used to assess applicants against the person specification. Once all the information has been obtained it is then possible to recommend applicants in order of merit.

3.4 Referees

Information from referees complements other sources of evidence available to the panel.

Each applicant must provide at least 3 referees for each position. It is expected that each applicant's site (or line) manager is named as a referee. In exceptional circumstances, an applicant may negotiate alternative referees with the Executive Director, Human Resources.

Referees may be contacted more than once, if appropriate, and at any stage of the process, including during shortlisting. Every Panel must contact at least one referee for each shortlisted applicant. Where applicants do not meet the essential minimum requirements, or are not shortlisted, the panel is not required to contact referees. Similarly, the panel is not required to seek information from all referees for any one applicant.

un-named referees

At times it may be necessary for panel members to extend their inquiries to other referees not named by the applicant in order to ensure the information is comprehensive and accurate. These people are 'un-named' referees.

'Un-named' referees may be contacted in instances where a named referee is unable to provide the relevant information or does not have a comprehensive knowledge of an applicant's relevant work performance. Where an un-named referee is identified by the panel, the applicant must be informed of the name of the person to be contacted. The applicant must be given the opportunity to register any concerns and where appropriate to suggest further referees. The panel must consider the concerns of the applicant in determining whom they will contact.

Referees should be advised that the substance of referee comments will be recorded in panel reports and made available to applicants on request.

When a panellist who is a named or un-named referee gives a referee comment it is to be obtained and treated in the same way as any other referee comments.

3.4.1 Guidelines for obtaining referees reports

Prior to contacting referees, the panel should prepare a set of questions based on the person specification in the light of information gained from the applicant's written application and other selection procedures which may have been used. Follow up questions may be necessary. These must be relevant to the person specification.

When telephone contact is made or an oral report is received the referee's comments should be noted and read back to check the accuracy of content and emphasis.

Where possible the same panellist should not seek reports from all the referees for a particular applicant.

It is obligatory to contact at least one referee for all shortlisted applicants. Referees of applicants who do not meet the essential requirements do not need to be contacted. It is not necessary to go to all referees for any one applicant. However, care must be taken to ensure that decisions about managing referee checks are consistent and equitable.

It is important to substantiate information provided by the applicant especially when this information is significant in the final decision.

In cases where conflicting information is provided by referees this should be further explored by the panel. This is particularly important when the referee has been objected to by the applicant. Great care should be taken in evaluating such information in the decision making process.

3.5 Interviews

Once shortlisting has been completed, the panel must determine whether or not to conduct interviews. Either all shortlisted applicants or no shortlisted applicants are to be interviewed. Where shortlisted applicants are required for interview they should be given adequate notice, prior to required attendance. Factors such as distance, interview complexity and special needs should be taken into account by the panel when scheduling interviews for applicants. If an applicant is unable to attend the interview, the panel may reschedule on the basis of each individual case.

If an applicant is required to attend an interview and is unable to attend on medical grounds an alternative time must be arranged. A medical certificate is required. An extension of time is negotiated between the applicant and

the chairperson. Undue delays may require the panel to seek information from other sources, rather than rely on an interview.

Similarly, if an applicant is unable to attend an interview due to other extenuating circumstances such as family bereavement an alternative time may be negotiated between the chairperson and the applicant.

3.5.1 Guidelines for interviews

Panels should ensure that:

- the interview is held in a location which is private
- special requirements for applicants with disabilities are accommodated
- a list of questions based on the person specification and information already gathered during the selection process is prepared prior to the interview
- the same or similar lead questions are asked of each candidate
- any follow-up questions are related to the lead questions
- the time frame for the interview is made clear to all shortlisted applicants
- notes are taken during the interview to be used in the final evaluation of information obtained during the process.

3.6 Prior knowledge

Prior knowledge is information held by a panellist which is directly relevant to an applicant's ability to meet the requirements of the person specification. If a panellist believes this would impact adversely on the individual's ability to achieve the desired outcomes of the position then this knowledge may be discussed confidentially with the chairperson.

It is the chairperson's responsibility to determine whether action is required. The prior knowledge should be clarified through appropriate questions either during the interview, with referees or by other selection methods being used by the panel.

A panellist may become a referee by agreement with the chairperson. In the case of a panellist being consulted as an

un-named referee, an applicant has the right to comment and nominate a further referee, who must be contacted. An applicant must be informed in the event of any un-named referees being consulted.

To avoid nepotism and patronage or the appearance thereof, it is important there is no conflict of interest in selection processes due to the nature of the relationship between individual panellists and applicants. (See Introduction - Basic principles of selection.)

3.7 Determining recommendations

The evaluation or decision making process depends on the panel's deliberate collection of information in a structured, systematic manner followed by evaluation of this information against a predetermined set of criteria - the person specification. The panel should design the selection process to ensure that this occurs.

During all stages of data collection, panellists should focus on the extent to which applicants meet the criteria being evaluated. Panellists should also consciously attempt to suspend judgement on the relative merits of applicants

until all information has been gathered. Panellists will of course gain impressions of candidates during interview, and these should be documented in the interview summaries. However, it is important that such impressions be confirmed by other sources such as referee comments or work samples.

Following the interview, the panel should decide which of the criteria require exploration or confirmation. Information gained from referees should be considered and recorded with information from other sources.

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