



Customer Involvement in Recruitment

Policy and Procedure

Policy Author: Customer Experience
Directorate

Valid From: November 2020
Review due: November 2023

The content of this policy **must not** be adapted or changed in any way, except where expressly directed to enter individual location names, or contact details.

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Look Ahead
CARE, SUPPORT AND HOUSING

Our mission

Working with people to make choices, achieve goals and take control of their lives through high quality care, support and housing.

Our values

Excellence

Aspiration

Partnership

Trust

lookahead.org.uk

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Policy

1 Scope

- 1.1 This policy is applicable for all recruitment activity within Look Ahead. This includes, but is not limited to, the following types of roles and contract types:
- Operational and non-operational
 - Board and executive level
 - Central services
 - Permanent positions, fixed term contracts, employees on secondment, bank and agency staff
 - All volunteering and apprentice positions
- 1.2 This policy should be read in conjunction with the following Look Ahead policies and procedures (list not exhaustive)
- | | | |
|--|---------------------------------------|------------------------------------|
| • Safer Recruitment | • Code of conduct | • Inclusion & Diversity |
| • Customer Reward and Recognition Policy | • Data Protection and Confidentiality | • Managing Professional Boundaries |

2 Policy Statement

- 2.1 Customer involvement within recruitment is one example of the choice and control we give to customers across all levels, to enable and empower them to be an active part of decision making at Look Ahead
- 2.2 This policy strategy sets out Look Ahead's approach to customer involvement and co-production within recruitment and selection and has been informed by our co-production commitments underpinned in our Co-Production and customer Engagement strategy and organisational involvement targets.
- **Equality** - Everyone has assets and something to contribute, if provided the opportunity.
 - **Diversity** - Barriers to involvement must be recognised and proactively removed to obtain inclusion for all customers' involvement within the recruitment process.
 - **Accessibility** - Opportunities must be accessible, and customers should participate in ways that suit them best.
 - **Reciprocity** - There should be clear responsibilities and reward/getting something back. Look Ahead believes customers will gain the following through application of this policy

- Building self-esteem and confidence in their abilities, insights and opinions
- The opportunity to work within a team and collaborate with staff who have different life experiences and perspectives
- To develop their decision-making and communication skills
- Gain an insight into the recruitment process, which can assist with future job applications
- An opportunity to contribute to the services they access

3 Recruitment Involvement Options

3.1 There are a number of ways that customer can be involved in the recruitment process. The level of engagement should be determined by a number of factors and not convenience of the recruiting manager:

- Customer preferences
- Role
- Length and type of contract
- Size of candidates
- Location
- In Person or virtual process
- Competency assessment for the specific role

3.2 The following are examples of how customers should be encouraged to become involved in the various stages of the recruitment process. Recruiting manager can deploy a number of options throughout the selection campaign.

3.3 **BLUE** level of recruitment

- Contributing to customer question bank questions which can be found [here](#)
- Creating role profiles
- Shortlisting
- Involved in Phone shortlisting interviews

3.4 **AMBER** Level

- Question bank – this is a pre-collated selection of questions gathered from current and former customers of Look Ahead services. These questions should be posed in an interview by a customer for maximum involvement, but can also be asked by a member of the staff interviewing team.
- Developing candidate assessments
- Leading and or involved in candidate service tours

- Leading and or involved in in candidate meet and greet sessions
- Acting as an observer on a interview panel
- Involved in interview role plays

3.5 GREEN Level

- Staff and customer Recruitment panel member
- Scoring candidate test / competency tasks
- Candidate presentation assessments - Interviewee to conduct a planned presentation to a group of customers who will score their performance against a pre-set criteria
- Sitting on a customer led interview panel
- Chairing customer interview panel
- Acting as observer and scorer on a group candidate assessment exercise

Inclusion and Diversity

Fair access and skills

- 3.6 Staff should determine the most meaningful and realistic options for their customers to participate within recruitment process, from the **Procedure (see section 6)**. Whilst the question bank may appear to be the most easily facilitated option, the focus should be on achieving the most appropriate and inclusive level of customer involvement in any recruitment and selection process

How to mitigate barriers to involvement

- 3.7 Planning ahead is essential to ensure customer involvement in recruitment is both meaningful and consistent across services. Please find a table in the appendix that details some of the common barriers to involvement, and how these can be overcome. Some of the strategies to assist with this include:
- The sharing of customer training packages - these have been developed centrally for staff to use locally.
 - Thorough risk assessment prior to the involvement to get to know the customer and enable any needs and/or concerns to be addressed prior to the involvement,
 - Linking with the HR and Learning and Development teams.
 - Staff engaging with the e-learning suite and relevant module for staff. Managers training will include this.
 - A database of customers from different services who can assist with interviews in other services and centrally.

Data Protection and Information Sharing

- 3.8 Where possible, the recruitment team will utilise technology to allow customer involvement within the interview process. This may include the use of virtual technologies to provide inclusion for candidate and or customers; to continue, in the context of the need to practice social-distancing and avoid unnecessary travel and journeys. Recruiting managers will follow local protocol in enabling customers

the use of platforms on social media, zoom, teams etc. to facilitate interaction between customers and interviewees (supported). The following data protection and confidentiality principles must always be followed in these instances: It is preferable that customers use their own technology e.g. smart phones, tablets etc. (See customer reward and recognition policy).

- 3.9 At no point should the customers' confidential, personal or sensitive data be shared with the candidate or other panel members
- 3.10 Where possible the recruiting manager/ panel chair should mitigate the sensitive data shared with the candidate. However it is reasonable during the course of the selection process for all interview panel members to see the candidate's previous work experience.
- 3.11 Certain details on candidate's files may need to be redacted.
- 3.12 It is not always possible to remove all personal candidate data and candidates may choose to share information with recruiting panels during shortlisting or final interviews stages. Customers must understand and adhere to Look Ahead's confidentiality policy and procedure and complete the Data Handling e-learning. Training can be supported by the Senior Co-Production Project Officer or the Senior Peer Support Project Office should the customer also be participating in the Peer Support training program.
- 3.13 Customers should not retain any information about candidates or interview documents provided on the day.

Inclusion

- 3.14 With regards to customer involvement in interview panels, staff should plan ahead with customers to ensure customers feel comfortable asking questions and give them a range of choices. For example, of which question, are they able to take notes of candidate responses and do they need help with this, whether they want to read or memorize questions, adapting to literacy/communication needs and finding a sensitive way to manage this.
- 3.15 Staff should be mindful of a customer's mental and physical needs when determining the activity and level of engagement within the recruitment process. The recruiting manager should work closely with the customer's key worker to determine strategies to enable involvement and understand risk mitigation plans. Specialist assistance may be required, so please notify the relevant teams as soon as possible. Risk management plans should always be conducted in advance of any involvement and staff should work with the key workers (central services) and or the relevant external authorities and multi-disciplinary health care professionals to support customers as needed and facilitate communication: e.g. deaf signers, translators, interpreters.
- 3.16 Non-verbal, deaf or customers with learning disabilities will face further barriers to becoming involved within recruitment. Look Ahead staff should seek to encourage these customers and support them in creating realistic and meaningful participation. The recruiting manager should work closely with the customer's key worker to determine strategies to enable involvement. Specialist assistance may be required, so please notify the relevant teams as soon as possible.

- 3.17 Customers should be clear on their roles and how the decision process works in advance of the interview process. Customers sitting on interview panels should be treated equally and their views and opinions and scores should be fully listened to as other non-customer panel members.

Managing professional boundaries and expectations

- 3.18 If customers want to ask additional questions which have not been planned ahead, customers should be aware of how to bring these forward in a way that will not disrupt the interview or give candidates an additional advantage not available to others.
- 3.19 The recruiting manager needs to discuss professional boundaries with the customer(s) prior to the involvement, both in terms of the customer(s) expected conduct, and that of the candidate. Customers should not be left alone with the candidate at any time.

Transport

- 3.20 The recruiting manager should communicate with the customer in advance of the involvement to plan how a customer will get to the venue. They should determine if they have a freedom pass, which form of transport they will be taking, provide a journey plan if relevant, and ensure that customers get a receipt for any expenses incurred.

4 Roles and Responsibilities

- 4.1 The **Recruiting Manager** is responsible for
- Working to the **attached procedure (see section 7)**.
 - The safety of customers in the panel, including undertaking a thorough risk assessment prior to the involvement to ensure that customer needs are met.
 - Facilitating customer completion of the training pack.
 - Ensuring they have read and understood the policy and guidance pack.
 - Completing the checklist in the appendix of this policy and amending to include important considerations for their specific customer group.
 - Informing customers of any available opportunities early and endeavoring to involve a diverse group of customers.
 - Actively seeking the highest level of customer involvement possible.
 - Providing involvement materials that are accessible and compliant with GDPR regulations.
 - Meeting with the customer(s) prior to the involvement to discuss any questions and go over relevant materials i.e. interview questions.
 - Informing the Senior Co-Production Officer at the earliest possible stage if there is any additional support or resources that are needed.
 - Recording if there was customer involvement in the recruitment, and the nature of said involvement on the Candidate Appointment Form.
 - Asking the customer(s) if they wish to be involved in similar opportunities and gaining consent to share their details with the Senior Co-Production Officer.
 - Identifying **Potential barriers to involvement and suggestions for solution (appendix 1)**
 - Using the **Manager's checklist (Appendix 2)** to reflect on an individual basis how to reflect the specific needs of each customer group.
 - Completing the user involvement section of the candidate Appointment Form

4.2 The **customer** is responsible for

- Informing staff of any additional support they will require to be involved in recruitment.
- Complying with confidentiality and GDPR regulations, and not sharing information outside of the recruitment involvement.
- Working with the recruitment manager to provide equal and fair assessment to each candidate, ensuring that all are provided with the same opportunities to highlight their skills, i.e. asking the same questions across all interviews.
- Ensuring they have completed and understood the training pack.
- Providing a receipt for any expenses incurred by involvement in recruitment practices.

4.3 The **Senior Co-Production Officer and Customer Directorate team** are responsible for

- Assisting and advising Central Services staff with facilitating customer involvement, including reimbursing of customer expenses from centrally held petty cash and/or luncheon vouchers.
- Advising and local operational staff with customer involvement in recruitment
- Monitoring customer involvement in recruitment against the target and reporting back to customers through the various customer forums, Senior leadership Team and Board
- Working alongside all recruitment managers to overcome any barriers to involvement and share best practice.
- Assist with the provision of and/or signposting to accessible materials.
- Providing a training pack for customers and accompanying guidance for managers.
- Compiling and sharing a customer question bank for use on interview panels where it is not possible for a customer to be present.
- Managing a centrally held database of customer details who wish to be involved in other recruitment/co-production opportunities and responsibilities

4.4 **Human Resource Shared Services** are responsible for ensuring recruiting managers complete the customer involvement section of the Candidate Appointment form (CAF) Appendix 3, and provide the Customer Experience Directorate with monthly data reports to support monitoring and reporting.

5 Procedure

5.1 **Customer Recruitment Involvement Process Map**

Recruitment Manager - Process Stage	Customer Involvement Process Stage	Customer Involvement Process Actions
Identify potential vacancy	Consider Training needs	Access E-learning for recruiting managers involving customers
Create/Review	Review menu	Identify the most suitable options for

Job profile	of involvement	involvement from the section 3 of the policy "Recruitment Involvement Options"
Vacancy sent to HR/IRIS (Advert closing date agreed) - Adverts to include customer involvement expectation	Involvement option agreed	Adverts to include customer involvement expectation
Vacancy agreed	Involve Co-production Officer	Start to Identify potential customers for involvement If need support, make initial contact with Senior Co-production to agree potential involvement and access any support required.
Training needs of customers	Training, Support & risk assessment	Customer (S) offered training if required
Shortlisting Date Agreed		Customers contacted to agree shortlist date if involved in shortlisting.
Potential Interview Date Agreed (Internal Only)		Customers contacted to agree potential interview date and outline contribution/input on interview day.
Interview Day Structure Agreed	Briefing & support	Support provided to customers to ensure meaningful input and prepping for interview day.
Shortlisting/Interview date/s finalised		All involved customers receive confirmation of dates and agreed involvement
Briefings	Briefing	Customers fully briefed on chosen involvement process before involvement Customer confirms they are comfortable and wish to proceed. Support needs identified
Interview Candidates contacted		Details of expectation of customer involvement included in candidate interview letter.
Interview Day/s Undertaken	Pre-selection briefing and checks	Pre- selection briefings and checks Customers undertake role as previously agreed and specified
Candidates scored and Assessed	Inclusion	Customers involved in scoring as previously agreed or specified choosing from menu of involvement
Candidate/s Appointed	Inclusion and debrief	Customer consulted/ informed of outcome of recruitment process if not fully agreed

Customer Involvement in Recruitment: Month YEAR

		on the day
Candidate Appointment Form	Outcome	Complete onboarding form include details of customer involvement and ask if the customer wishes to become involved in wider recruitment opportunities, if so gain consent to share contact details with Senior Co-Production Officer.
Candidate acceptance	Outcomes	Customer informed if candidate accepted

Appendix 1: Potential barriers to involvement and suggestions for solution

Barriers	Solutions
Confidentiality/data protection	Work with Human Resources and take out personal information when short listing applications. Do not let panel members take away interview documentation i.e. CV's.
Jargon/Acronyms	Use plain English. Discuss any relevant documents before the involvement to ensure all understand. Ensure customer communication needs are met by thorough risk assessment and provide information in different formats if necessary.
Process is too complicated (real or imagined)	Simplify processes where possible and utilise the training pack. Have informal interview and/or group interviews.
Financial (volunteer panel members not paid)	Provide sustenance and cover travel expenses with a receipt. Discuss prior to the involvement if the customer has a freedom pass, and if not, how you will reimburse them. Refer to customer reward policy
Communication barriers i.e. non-English speakers, non-verbal, speech difficulties	Use individual strategies to help the customer put together questions that they wish the panel to ask, i.e. use Big Word/translation services, Makaton, PECS, easy read materials. The Senior Co-Production Officer can advise on available resources and assist with the creation of accessible materials.
Commitment of volunteer panel members	Use different volunteer panel members to give feedback, allow for various levels of involvement that enable a range of people to be involved.
Lack of confidence	Do mock interviews and utilise the training pack to build knowledge/skills.
Uncomfortable environment	Look at doing interview in a community setting/and or where the successful candidate would be working.
Matrix system doesn't give candidates the opportunity to demonstrate the qualities that customers want to see i.e. empathy.	Help volunteer panel members to ask real life scenario questions, whilst ensuring that all candidates are asked the same set of questions.
Central service team that has little customer interaction	Involve the Senior Co-Production Officer from the earliest possible stage who will be able to support and facilitate customer involvement. Discuss any reservations/concerns as they arise and risk assesses to overcome these.

Appendix 2: Managers checklist

Please amend on an individual basis to better reflect the specific needs of each customer group.

Checklist	Tick
Does the customer need any extra support to feel comfortable on the day?	
Have you completed a risk assessment?	
Is the venue accessible?	
Is the venue on a major transport link for buses and trains?	
Does the customer need help to arrange transport?	
Does the venue have a hearing loop system if required?	
Is the time convenient for the customer? It may not be practical for some people to come too early or late in the day.	
Have you introduced the customer to the wider panel/group prior to the involvement?	
Will a personal carer or support worker also be coming? How will they support whilst not having involvement in the selection process	
Will you need to provide lunch and refreshments? If so, are there any dietary requirements?	
If the involvement is taking place over a period longer than 1 hour, have you scheduled regular breaks?	
Have any communication needs been identified? If yes, have you provided resources in an accessible format?	
Have you clearly spelled out the purpose and boundaries of the activity and everyone's role/responsibility?	
Do you require any other assistance? If so, have you contacted the Senior Co-Production Officer?	
Does the customer wish to be involved in other similar opportunities across the organisation? If so, please note their name and contact details and send to the Senior Co-Production Project Officer.	

Appendix 3

Candidate Appointment Form

Please complete all relevant sections of this form, sign and email to recruitment@lookahead.org.uk
Should you require any assistance please contact the Recruitment team on 0207 368 4637

Candidate Details	
Full Legal Name (including middle name)	
Known as Name	
Home Address (including post code)	
Email Address	
Contact number	

Job Details	
Job Title	Job Reference Number
Location	T1 Code(s)

Role Details		
Role Type (please ✓)	Duration of Contract (if temporary)*	
✓		
Salary (per annum)	Hours per week	Full Time Hours

Interview Process – Customer Involvement	
Interview process and customer involvement	
Customer Involvement included (please ✓) cont. overleaf	
✓ Please select all that are applicable	
<input type="checkbox"/>	Customer Question Bank
<input type="checkbox"/>	Customer on Interview Panel
<input type="checkbox"/>	Customer Service Tours
<input type="checkbox"/>	Candidate Shortlisting
<input type="checkbox"/>	Customer Panel
<input type="checkbox"/>	Customer Activity Workshop
<input type="checkbox"/>	Customer Meet and Greet

Customer Involvement in Recruitment: Month YEAR

Other (Please provide detail in box on the right)	
No Customer Involvement	

Required Documents (Please ensure that the following documents are attached to this form)		
Right to Work (RTW) <u>NO</u> employee is permitted to start work without the RTW having been submitted to HR		
Certified RTW attached (please ✓)		
	✓ Please select as applicable	✓
✓	✓ UK Passport	✓
✓	✓ UK Birth Certificate	
✓	✓ EU Passport	
✓	✓ EU Residence Permit	
✓	✓ Biometrics Residence Permit/ Visa	
✓	✓ Other (Please provide detail in box on the right)	
Comments		

Approval									
Contract Manager Name									
Contract Manager Signature									
HR Business Partner Signature									
Date	2	8	0	6	2	0	1	9	

Glossary

Term	Definition

Related documents

Document	Link
Connected Policies	Safer Recruitment Customer Reward and Recognition Code of Conduct Data Protection and Confidentiality Inclusion & Diversity Professional Boundaries
Forms and Letters	
Information Sheet	
Easy Read	
External Websites	
Legislation/Regulation	

Version Control

Version no.	1	Date effective:	November 2020
Brief summary of changes:			
Author(s)	Nicole Njie- Customer Experience Director Kate Mahoney – Senior Co-production Project Officer Zahra Rankin – Business Development Manager Sara Asaria- Senior Policy Officer		
Colleague consultation:	Contract Managers Central services recruiting managers		

Customers consulted:	Peer Support Volunteers Customers from a range of services and customer groups
Results customer consultation:	
Other consultation:	
Signed off by:	
Author:	
Review date:	



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