CPSMA Guidance Note in relation to conducting interviews using Video-Conferencing Technology

> *NB: CPSMA does <u>not</u> recommend the use of video-conferencing technology for the purposes of conducting interviews for senior management positions, i.e. school Principal and Deputy Principal (both internal and external competition) in Catholic schools.*
>
> *CPSMA recommends that the interview process for such senior management positions should be conducted face to face, where possible, in compliance with relevant recruitment procedures and in compliance with HSE social distancing protocols and the Roadmap for Reopening Society & Business.*
>
> *A Board of Management should always consult with its Patron to confirm its Patron's requirements in this regard <u>prior to</u> commencing any recruitment process.*

1. Introduction:

This resource is intended to assist Boards of Management in exercising best practice in the use of Video-conferencing in the recruitment of staff. One of the key considerations in the use of digital technology to facilitate shortlisting meetings/interviews, is the selection of a secure video platform to host the shortlisting meeting/interview. Appendix A of this guidance note contains a number of digital options for the Board to consider. While every effort has been made to ensure the accuracy of the information provided, schools are advised to confirm that the selected platform is appropriate to the recruitment requirements, and that the security and privacy provisions meet the highest standards. A privacy impact assessment should be carried out in advance of deciding which software to use. Schools should also ensure that their video-conferencing protocols are consistent with the procedures set out in the relevant recruitment circulars.

Circular 0044/2019 *Recruitment/Promotion and Leadership for Registered Teachers in Recognised Primary Schools* sets out the recruitment/promotion procedures for the following positions:

- Appointment of Principal/Deputy Principal through open competition (Chapter 4)
- Appointment of Teachers (Chapter 2)
- Internal Appointment to Leadership and Management positions (Chapter 3)

When, having sought the approval of the Patron, a Board of Management decides to facilitate an online interview, the Board should consider the rationale for doing so and the availability of suitable technological infrastructure and resources.

It is recommended that the reason for facilitating interviews using digital technology is recorded in the minutes of the Board of Management meeting at which the needs and priorities of the school are discussed and defined, for the purpose of the recruitment/appointment procedure.

Where an online interview is being facilitated under the provisions of Circular 0044/2019, there are two options which a Board of Management may wish to consider:

Option 1: The Interview Board will convene in one location, if permitted by the public health requirements in place at the time, observing all HSE social distancing protocols, and will interview each candidate using an agreed platform (see Appendix A).

Option 2: Each member of the Interview Board will participate individually from separate locations in the video-conference interview, i.e. "individual participation" conferencing.

Whilst the "individual participation" conferencing will have the added complications of ensuring that each interviewer and interviewee is fully familiar with the technology, the following guidance will apply to both **Option 1** & **Option 2** above;

1. The Interview Board should ensure that all members have sufficient Broadband speed available for the successful operation of the online recruitment process. In choosing an appropriate platform for the shortlisting meeting/interviews, Boards must ensure that the security functions of the selected platform are fully scrutinised and adhered to.

2. All Interview Board members should be given adequate time to download (where applicable) and become familiar with the functions of the selected platform (see Appendix A). A trial meeting of the members of the Interview Board should be held in advance of any official meeting/interview to ensure that all members are familiar/comfortable with the technology.

3. The running order of the interview will need to be clearly established beforehand (possibly during the trial meeting) to ensure that the interviewers are cued appropriately for their individual agreed questions, and to facilitate a co-ordinated approach.

4. The time-tabling of the interviews requires careful consideration. Each interview requires a separate "meeting invitation" to avoid any risk of intrusion. There should be adequate time allowed between the interview meetings. Additional time should be factored between each interview as a contingency in case there are technical issues e.g. 15 minutes.

5. It is recommended that interviews would not be scheduled over an extended period of time. However, if interviews have to be scheduled in this manner, allow for breaks at regular intervals.

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6. Normal considerations under GDPR and the Data Protection Acts 1988- 2018 as would apply to the recruitment and interview process continue to apply, regardless of the chosen method of conducting interviews.

2. Procedures

1) The recruitment/promotion procedures set out in Circular 0044/2019 should be fully adhered to.
2) The provisions in respect of "Electronic Applications" should be followed and applications should only be requested by email.
3) The only difference that will apply during the COVID-19 restrictions, is that the shortlisting meeting may be held remotely, using a video-conference platform. (See Appendix A). At this remote meeting, the Chairperson of the Interview Board will advise the other Interview Board members of the needs and priorities of the school, as these identified needs will inform the criteria for assessment. Note: Specific criteria for assessment for Principal, Deputy Principal and Internal Leadership positions are provided for in Circular 0044/2019.
4) The Interview Board members shall establish agreed criteria for the assessment of the applications and for interview prior to downloading the applications. The interview questions, based on the established criteria, will also be agreed at the shortlisting meeting.
5) Having established the agreed criteria, the password for access to the distinct e-mail address used in the advertisement (e.g. schoolnameapplications@gmail.com) should be given to all members of the Interview Board, by the Chairperson, to facilitate the simultaneous downloading of the applications. The applications should be downloaded to a temporary folder on the Interview Board member's PC/Laptop, for the purposes of the shortlisting meeting.
6) At the end of the shortlisting meeting, the password on the dedicated email address should be changed by the Chairperson of the Interview Board, and the temporary folders deleted from individual devices. The only documentation to be retained after the shortlisting meeting is any record of the application of the criteria during the selection process. All electronic applications must be saved by the school electronically, deleted from the email/on-line system and after the appropriate retention period, deleted from the saved electronic file.
7) The Chairperson will forward the relevant documentation for the shortlisted candidates separately to the Interview Board members, in advance of the interview, to allow them ample opportunity to print/read them in preparation for the actual interviews.

    Note: The school authority should retain the documentation relating to unsuccessful applicants (including those who were not shortlisted for interview) for 18 months.
    In relation to the successful applicant, the documentation should be retained for the duration of his/her employment plus 7 years.

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3. The Role of the Chairperson of the Interview Board

In addition to the responsibilities set out in the relevant recruitment processes, the Chairperson of the Interview Board will have the following additional responsibilities, when interviews are conducted via video-conferencing:

a) Ensure that each Interview Board member is clear on their role, areas of questioning and the sequence in which they will be asked to speak.

b) Ensure that the members of the Interview Board are aware of how to turn off (mute) their microphone should the need arise.

c) Suggest that only the microphone of the Interview Board member who is asking the question remain unmuted, to avoid unnecessary feedback.

d) Ensure that the interview schedule is strictly adhered to, including the monitoring of contingency time for technical issues, if they arise.

e) Ensure that each candidate is invited to join the remote interview at the scheduled time.

f) Explain to the candidate that it is a remote interview using video call software.

g) Explain to the candidate that every effort will be made to resolve technical issues which may arise within the time allocated for contingencies. Where the issue extends beyond the allocated time, the interview may be rescheduled within the timeframe already scheduled for that particular post.

h) Explain to the candidate that where a technical issue results in sound being lost that the nominated Interview Board member may contact the candidate on the mobile number provided by them to establish if the issue can be resolved.

i) Reiterate that any form of recording is NOT permitted by any of the parties and reconfirm that they have already agreed to same as part of confirming their attendance at interview. (If already incorporated in confirmation of attendance, not necessary to repeat.)

j) Reiterate that that the candidate has already confirmed that there will be no one else present in the room with them. (If already incorporated in confirmation of attendance, not necessary to repeat.)

k) Ensure that the candidate has left the remote interview at the end prior to any discussion regarding the candidate's performance commencing.

l) Ensure that all interview documentation (e.g. marking sheets, report to the Board etc.) is fully completed and signed as per agreed procedures.

4. Invitation to Interview

1) The invitation to interview will be issued by email, in accordance with the relevant recruitment/promotion procedures. The invitation will state that the interview will be conducted remotely, using the agreed platform (e.g. Google Hangouts) and should include information on the use of the platform, including the appropriate security provisions required for its use.

2) The invitation should also state that it is the responsibility of the candidate to ensure that he/she has sufficient broadband speed and familiarity with the functions of the

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platform, to engage in the interview. Advise the candidate that by accepting the invitation to interview he/she is agreeing to the following:

   a) To be interviewed using video-conference

   b) That he/she will download and access the relevant software on the remote device and location that they will be using for the interview and familiarise him/herself with its functions, in advance of the scheduled interview date.

   c) That he/she gives consent for the designated Interview Board member to contact them on the contact number provided on their application form in the event of any technical difficulties occurring during the interview.

   d) The interview will not be recorded by any party using audio, video or other means. Each person's participation in the interview is conditional upon such prohibition of recording, irrespective of the purpose or any intended use of such a recording, personal or otherwise.

   e) To confirm, at the outset, that he/she is participating on their own, without the possibility of being assisted, over-heard or recorded.

3) The candidate should be asked to confirm his/her agreement with points a) to e) above, and his/her availability for the online interview, by a specified deadline, before any "meeting invitation" link is sent. Failure to comply with the requirements set out at points a) to e) above will render the interview invalid and the candidate will no longer be considered for appointment to the position advertised.

4) Candidates should be offered guidance in relation to the software being used in advance of the interview, including best practice e.g.

   a) Test the remote device and location that they will use for interview including the connectivity - this will include camera and microphone access.
   b) Use of a laptop is preferable, as the candidate will be able to view all three members of the interview board at the same time.
   c) Use of headphones with speakers are permissible, to improve the sound quality.
   d) Check the background is suited to the process (e.g. it could be too busy, the lighting may be unsuitable)
   e) Ask candidates to ensure there is no interference at the place they are conducting their interview.
   f) Ask candidates to bring their mobiles (switched to silent) to interview so that the nominated Interview Board member could contact them in the event of technical difficulties.

See Appendix B for a sample *Checklist for Interview Candidate*s, which could be included in the "Invitation to Interview" email.

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5. Interview

1) The usual interview protocols will apply, i.e. the Chairperson will welcome the candidate, introduce the members of the Interview Board, and by way of putting the candidate at ease, outline the structure of the interview. The questions under each of the established criteria will have been agreed at the shortlisting meeting.
2) All members of the Interview Board must ensure that the "virtual" interview space replicates (as closely as possible) what is expected in a face to face interview environment, i.e. comfortable, free from distraction etc.
3) In the absence of personal interaction, care must be taken to ensure that following the introduction to each member of the Interview Board, that he/she is given ample opportunity to adapt to the interview space, before the interview commences.
4) Eye-contact is extremely important, and all members of the Interview Board should strive to keep that connection with the candidate.
5) Speak clearly and avoid interrupting the candidate or fellow interview board members.
6) When listening, nod and smile, when appropriate, to show that you are engaged.
7) The Chairperson will lead and direct the interview, and will ensure that the online interview follows the best practice that is expected in face to face interviews, particularly in relation to note-taking and the completion of marking sheets.
8) Notes and Marking Sheets should be retained securely by the Interview Board members until they can be physically handed over to the Chairperson, and stored in the school premises. An applicant's own marking sheets should be made available on request, after the recruitment process is completed.
9) An order of merit should be retained, which can be used if the highest ranked applicant nominated for appointment declines the position.

6. Post Interview

1) Following the completion of the interview process, the Chairperson of the Interview Board shall submit the required written report to the Board of Management. This report may be read out at the Board meeting, and retained as Board correspondence. A copy of this report is also included in the record of retained documents, as per the relevant appointment procedure. The report should state that the interviews were conducted remotely, using the named platform (e.g. Webex). The Board Meeting to sanction the appointment may also be convened remotely.
2) Following receipt of the Patron's approval to appoint, an offer may be made to a successful candidate. This notification letter of offer may be sent by email to the successful candidate, stating that the offer of employment is subject to the terms outlined in the relevant circular (e.g. confirmation of qualifications, compliance with Garda vetting requirements and pre-employment medical screening, where applicable, prior to commencement of the employment etc.)

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3) Required documentation, (as per point 2), as well as DES Appointment Forms and contracts of employment, should be scanned and exchanged by email, where it is not possible to exchange documents by post.

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Video-conferencing options

There are many digital options available to conduct remote Board of Management meetings/interviews.

For the purposes of this Guidance Note, information on three examples of such digital options is provided for consideration by the Board of Management.

Cisco WebEx

WebEx is one of the most trusted and used digital platforms for business video conferencing worldwide, providing end-to-end encryption for all users. WebEx users set up an account and then invite participants to scheduled meetings. While a cost is usually involved, a package allowing for a free 90 day licence has been announced during the COVID-19 period.

Go to the WebEx homepage here to create an account and get set up.

Google Hangouts

There are advantages to using Google Hangouts over WebEx. One, almost every person has a Gmail account making setup much easier and two, it is free for meetings of any duration.

Click here to set up an account.

Microsoft Teams

Microsoft Teams is part of the Office 365 package. Once downloaded, the organiser can create a team and add members. Guests can be invited by using their email addresses.

Click here to find a short video on setting up Microsoft Teams.

Appendix B

Candidate's Checklist for Remote Interview	
Please ensure that:	
the device, meeting software and connectivity have been tested, in the location, ideally a number of working days in advance so that any potential issues can be resolved in time	
the internet connection is stable	
the location is quiet, free of any background noise or possible interruptions	
where prompted to enter a username that an appropriate name is entered; do not enter nicknames, etc.	
external video calls are blocked for the duration of the interview	
the background is professional, ideally a blank wall	
the lighting does not cause a glare or place your profile in shadow on screen	
the device web camera and audio are working	
the device is fully charged or connected to a mains charger	
the camera is positioned so as to view your shoulders and above (position the camera so that you are looking up slightly and centred on the screen)	
that your mobile phone is to hand, and switched to silent	
Dress professionally and avoid bright colours or patterns	
Have a glass or bottle of water available	

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Interview Board Member's Checklist for Remote Interview Please ensure that:	
the device and meeting software have been tested, ideally a number of working days in advance so that any potential issues can be resolved in time	
the internet connection is stable	
the location is quiet, free of any background noise or possible interruptions	
external video calls are blocked for the duration of the interview	
the background is professional, ideally a blank wall	
the lighting does not cause a glare or place your profile in shadow on screen	
the device web camera and audio are working	
the device is fully charged or connected to a mains charger	
the camera is positioned so as to view your shoulders and above (position the camera so that you are looking up slightly and centred on the screen)	
Interview documentation is positioned so that the candidate cannot read your notes	
You have pen and paper to hand (if any notes will form part of the interview process and must be returned at the end of the interview)	
Dress professionally and avoid bright colours or patterns	
Have a glass or bottle of water available	

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