# Shortlisting and panel decision record

Schools in England. Use one record per candidate, applying the same role criteria. Add pages if needed. Keep this in the secure recruitment file.

**Vacancy and candidate reference** _____

**Panel members and date** _____

**Agreed scoring scale and evidence rules** _____

## Shortlisting

☐ **Apply the published criteria** KCSIE 300 / ACAS

Use at least two people and consider gaps or inconsistencies. Agree criteria and evidence before comparing applications. Keep equality monitoring separate. Record the evidence for the shortlist decision.

☐ **Prepare for an accessible interview** EQUALITY ACT / KCSIE 296 TO 299

Ask about reasonable adjustments and make them where required. Avoid pre-offer health or disability questions unless a statutory exception applies. Request lawful criminal record self-declaration only from shortlisted applicants.

☐ **Decide whether to use an online search** KCSIE 301 / DATA PROTECTION

Consider a proportionate search of public information for shortlisted candidates, notify them that it may happen and separate irrelevant information from the decision. Record only relevant findings and give a chance to respond.

**Criterion 1 and application evidence** _____

**Score and reason** _____

**Criterion 2 and application evidence** _____

**Score and reason** _____

**Criterion 3 and application evidence** _____

**Score and reason** _____

**Outcome** ☐ Invite ☐ Do not invite ☐ Review

**Decision, reasons and follow-up questions** _____

INTERVIEW DECISION

# Panel assessment and outcome

Use evidence from the agreed selection methods. Keep safeguarding concerns and required checks visible even when the overall score is high.

☐ **Agree structured questions and role evidence** KCSIE 305 TO 310 / ACAS

Use the same core questions where possible and allow appropriate adjustments. Test motivation for working with children, relevant experience and concerns or gaps. Use follow-ups and pupil involvement where appropriate.

**Criterion 1, source and evidence** _____

**Score and reason** _____

**Criterion 2, source and evidence** _____

**Score and reason** _____

**Criterion 3, source and evidence** _____

**Score and reason** _____

**Safeguarding issue and action or record location** _____

**Panel decision** ☐ Conditional offer ☐ Reserve ☐ Do not appoint

**Evidence for decision and conditions** _____

**Chair, date and candidate notification** _____

A panel recommendation is not start clearance. Resolve any outstanding concerns and complete the applicable pre-employment checks through the authorised process.

## Sources

KCSIE 2026 | 289 and 296 to 313

Equality Act 2010 | Reasonable adjustments

Equality Act 2010 | Recruitment discrimination

Equality Act 2010 | Pre-offer health questions

Acas | Shortlisting

Acas | Interviews

ICO | Recruitment and selection