INTAKE MEETINGS FOR SUCCESSFUL RECRUITMENTS

WHAT IS IT?
An intake meeting is the initial strategy meeting in which the Hiring Manager and HR discuss the goals that should be met during the recruitment process. It may be initiated by any of the parties involved and is a partnership in designing a successful recruitment strategy. The intake form is best review beforehand by both the Hiring Manager and HR, but completed together as a concerted effort.

WHY?
- Ensure a successful hire through strategic planning.
- Gain a better understanding of qualities in a successful candidate.
- Increase likelihood of a diverse applicant pool.
- Enhance the candidate experience.
- Decrease likelihood of turnover by setting selected candidates and organization up for success.
- Reduce job posting edits and cancellations.
- Mitigate bias throughout the recruitment process.

WHEN?
As soon as you are aware of a vacancy, organize a meeting.

PREPARE
- Familiarize yourself with the needs of the position (focus on the skills and responsibilities).
- Assess current team strengths and weaknesses to identify skill gaps or needs that may inform position description.
- Review previous recruitments on similar positions to assess what worked/what didn’t.
- Review any exit interview information or climate survey information.
- Review Intake Meeting form to familiarize yourself with what you need to consider and questions you may want to ask and discuss.
- Schedule a meeting space & time with minimal distractions.
- Pull demographic data for both your unit/team and applicants from similar positions over the last 3 years.
Review and agree upon the job responsibilities and skills for position. Set a recruitment timeline. Decide on recruitment goals to diversify the applicant pool and intentional efforts to temper bias throughout the recruitment process. Decide on the search/search and screen committee function, structure and expectations. Create the advertising strategy:
- Candidate outreach
- Relevant job boards
- Networking opportunities
- Community partnerships

Determine the recruitment process/procedures:
- Identify roles, responsibilities and expectations (e.g. who communicates with applicants, who is the final decision maker, etc.)
- Schedule kick off meeting
- Draft the screening criteria and tools to ensure the criteria is reflected in the position description, to bring to the search/search and screen committee for final review
- Interview schedule and format

Determine title and salary range. Prepare a position description draft for review with Search and Screen Committee.

YOU'RE READY!
Using the intake meeting form you are now ready to partner with your hiring colleagues to strategize!

FOR ADDITIONAL RESOURCES:
https://hr.wisc.edu/hr-professionals/recruitment/