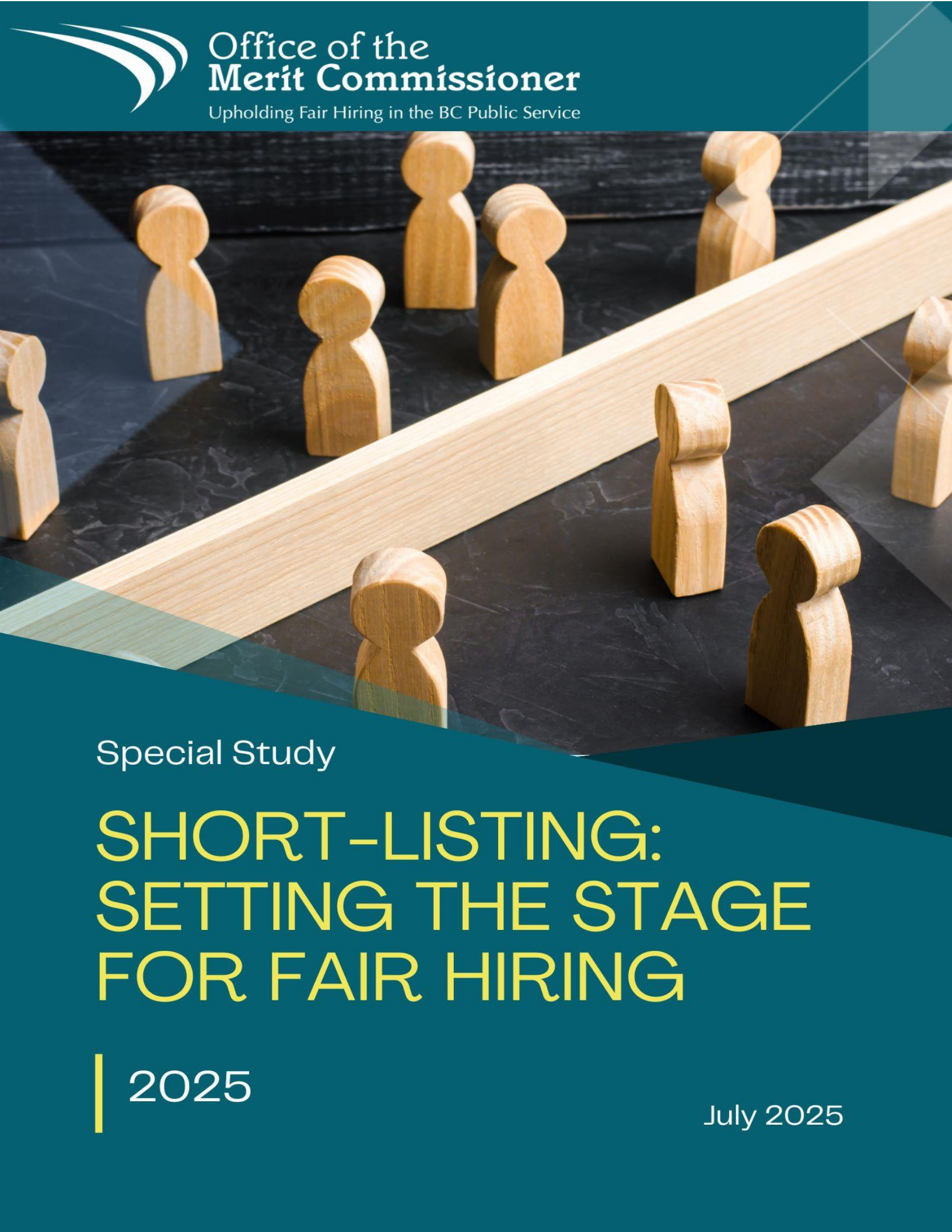




Office of the
Merit Commissioner

Upholding Fair Hiring in the BC Public Service

Special Study

SHORT-LISTING: SETTING THE STAGE FOR FAIR HIRING

| 2025

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INTRODUCTION

In British Columbia, the principle of merit underpins every public service hire to ensure appointments are based on candidates' knowledge, skills, experiences, abilities, past work performance and years of service, rather than patronage or personal connections. Upholding the merit principle is integral to securing a professional, impartial workforce as well as public confidence in government decision-making.

Audits of merit-based hiring, and studies of hiring pain points such as this study of short-listing, provide deputy ministers and organizational heads with insights to pursue recruitment practices that are fair, transparent, and merit-based.

Background

Section 5(1) of the *Public Service Act* (the Act) states that the Merit Commissioner is responsible for monitoring the application of the merit principle through random audits of appointments. To this end, the Office of the Merit Commissioner (OMC) conducts yearly [merit performance audits](#) examining the recruitment and selection processes that result in the appointments under the Act. A more detailed description of the OMC's role can be found in our [annual reports](#).

With respect to the recruitment and selection process (often referred to as the "hiring process" or "competition"), OMC auditors examine the seven common stages of a competition. These stages are recruitment, short-listing, interviewing, testing, past work performance, years of continuous service, and selection. The auditors assess whether hiring processes have been designed and applied in accordance with the requirements of the Act, relevant policy, and provisions of collective agreements. The auditors also evaluate hiring processes in accordance with the following fairness principles:

- open and transparent process;
- objective and relevant means of assessment;
- reasonable decisions; and
- fair and consistent treatment of applicants.

Why a special study on short-listing?

For several years, the short-listing stage of the merit-based hiring process has been identified through merit performance audits as the most error-ridden stage in public service hiring. More recently, audit results have shown that short-listing errors in public service competitions have been increasing. In addition, it has been more common to see short-listing errors in public service competitions that result in a finding of "merit not applied" in the competition. As short-listing occurs at the beginning of the recruitment and selection process, errors in merit at the short-listing stage can pose a serious risk to the entire merit-based hiring process.

Errors in shortlisting can have a range of negative impacts. Most seriously, shortlisting errors can lead to hiring candidates who are not fully qualified: that is, to employees without the education or experience that the hiring manager had determined was needed to do the job. Other shortlisting errors can negatively impact candidate experience, such as when qualified candidates are unfairly screened out, and therefore may undermine the attractiveness of the BC Public Service as an employer of choice.

What is short-listing?

Short-listing, also often referred to as “screening,” is the process of reviewing applications (e.g. cover letters, resumes, application forms, and/or questionnaires) to determine which applicants meet the minimum required mandatory qualifications and will advance for further assessment. The required qualifications evaluated at this stage are typically education and experience. The minimum required mandatory qualifications are those advertised in the job posting and/or profile. Short-listing may also consider other related requirements such as professional designations, certifications, and licences which can be confirmed through reviewing application documents and do not require a qualitative assessment.

The minimum required mandatory qualifications are those advertised in the job posting and/or profile.

With respect to short-listing, merit performance audits consider:

- Whether the panel’s approach to short-listing is appropriately designed to advance only those who demonstrate the minimum (mandatory) required qualifications.
- Whether the hiring manager screens for the mandatory required qualifications they advertise in the job posting and/or profile, or whether they accept lesser qualifications. Applicants base their decision to apply on the advertised mandatory required qualifications. Therefore, for the sake of transparency, hiring managers must not accept qualifications lower than those that they advertised or posted.
- If the hiring panel applies the criteria fairly and consistently for all applicants, or whether they give some applicants special treatment in deciding that their qualifications meet the posted requirements.

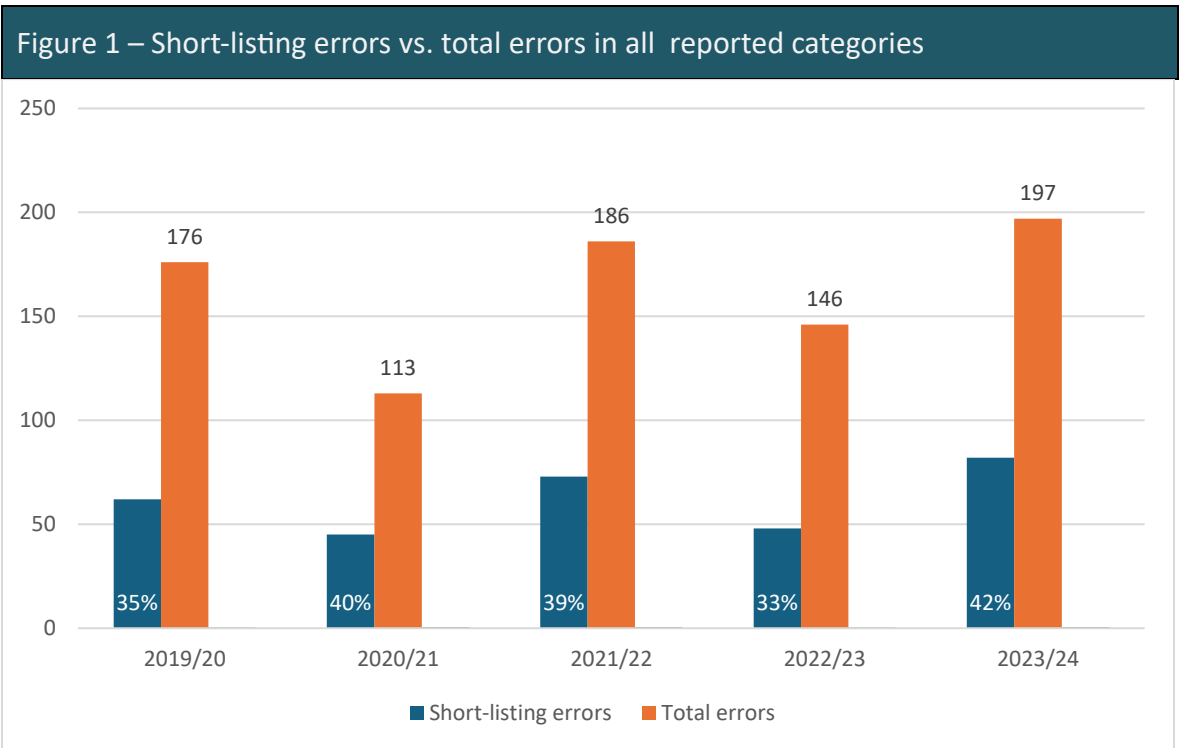
Ongoing area of challenge

Short-listing has consistently been the part of the hiring process where the most merit errors are found in performance audits since the 2016/17 audit year, when the OMC began reporting on errors in short-listing as a distinct phase of the competition. Over the past five years, short-listing has made up 310 (38%)¹ of all merit errors identified, out of a total of 818. Short-listing

¹ This number has been rounded up.

has had the highest share of total errors each year, ranging from 33% to 42%. Moreover, from 2022/23 to 2023/24, the number of errors rose sharply—from 48 to 82.

In addition, aspects of short-listing have been the subject of two special studies ([Self Assessment Questionnaires 2015](#) and [Lessened Qualifications 2023](#)).



*From 2019/20 to 2022/23, errors were reported for six categories, one of which was short-listing. In 2023/24 the office began reporting out on seven categories.

Each year, the Merit Commissioner makes recommendations to deputy ministers and organization heads to improve merit-based hiring processes. These recommendations are based on the findings as well as the most significant issues identified through the annual merit performance audit for that fiscal year. Since 2012, the merit performance audit reports have included recommendations that have been specific to, or relating to, the short-listing stage. However, there have been no observable improvements in the audit results for this stage of the process. In fact, between 2022/23 and 2023/24 there was a noticeable

Since 2012, the merit performance audit reports have included recommendations specific or relating to the short-listing stage. However, there have been no observable significant improvements in the audit results for this stage of the process.

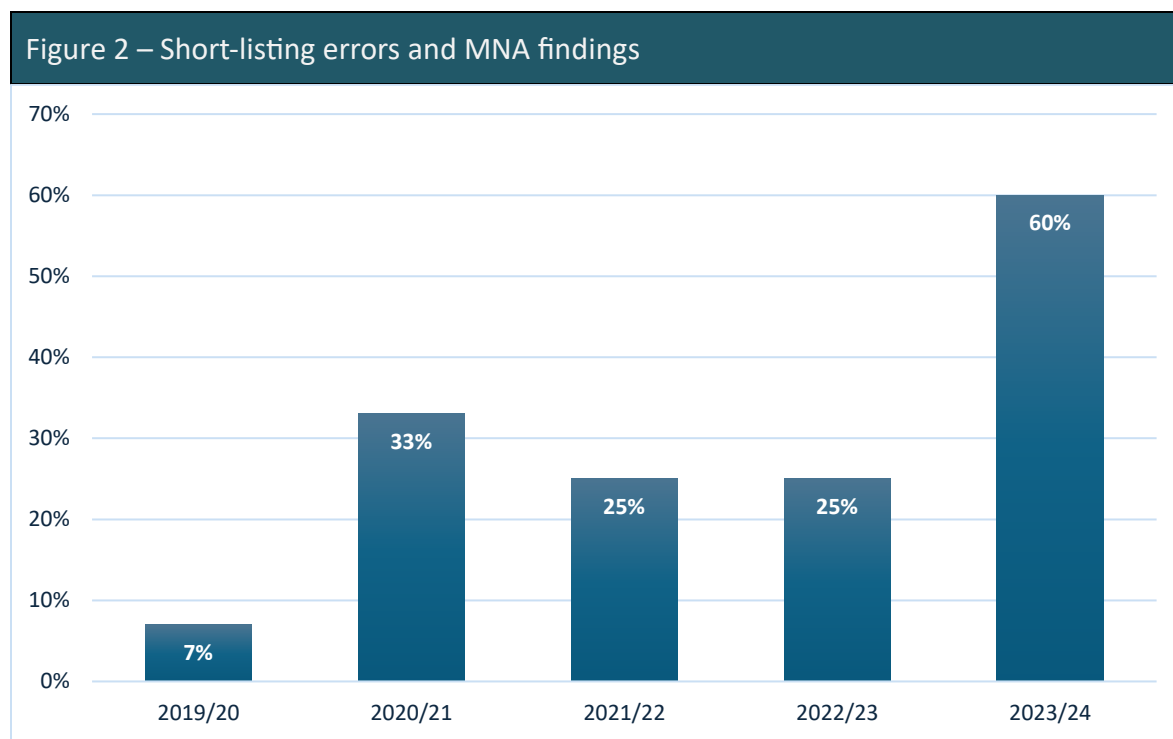
increase in the number of errors occurring during short-listing.

Further, in 2023/24, short-listing errors accounted for 60% of the total “merit not applied” findings for the audit year. This is a significant increase from previous years. “Merit not applied” findings, as they relate to short-listing errors, are discussed in more depth in the next section.

Short-listing errors and Merit Not Applied (MNA) results

When auditing hiring competitions, the OMC can make three different findings. The most serious is called “merit not applied” (MNA). This happens when an error in merit leads to a known negative impact on the competition outcome, such as hiring someone who does not meet the minimum mandatory required education or experience posted for the job.

The office looked at how often short-listing errors led to MNA findings. Over the last five audit cycles, the percentage of these serious errors (short-listing errors resulting in an MNA finding) has varied. These errors significantly increased between 2022/23 and 2023/24—from 25% to 60%.



In the 2023/24 audit cycle, there were 28 audits that resulted in an MNA finding. More than half of the MNA errors were short-listing errors. Seventeen appointments (more than half) received an “MNA” finding because of one or more shortlisting errors.

Objectives

This study has two objectives.

1. Observe and report on an area of challenge in hiring that has been flagged over several years for government and other organizations subject to audit. In examining the data already collected through the merit performance audit program over an extended period, what can we learn about the incidence of short-listing errors in public service hiring?
2. Provide the government and other organizations who hire under the Act with insights into improvements that are needed, and provide recommendations for all organization heads to improve short-listing practices within their own workforce.

Scope and approach

The source data for this report is from the case management systems used by the Office of Merit Commissioner for the last five audit cycles (2019/20 to 2023/24). In addition, some aspects of this report relied on previously summarized data, analysis of data extracted from annual reports, and merit performance audit reports for the respective audit years.

To examine short-listing errors over time and to understand where short-listing practice in audited competitions has gone awry, the study examined audit data and previously summarized data in relation to these errors for the last five audit cycles. The analysis examines these errors by type (compliance, design and application), as well as the nature of the error. The 2023/24 data was specifically reviewed to identify errors associated with the topics considered in the two previous special studies on lessened qualifications and self-assessment questionnaires.

Secondly, overall short-listing data for the same five audit cycles was analyzed to look at other factors of the audits to better understand when and where short-listing errors have been occurring. The analysis focuses on determining what factors may contribute to short-listing errors. For example, what contribution do competition size, position classification, competition type or internal versus external competitions make to short-listing errors?

UNDERSTANDING SHORT-LISTING

Anatomy of short-listing requirements

Minimum (also referred to as mandatory) required qualifications, typically the minimum education and experience required, form the foundation for short-listing. Below is an example of the common job posting/profile wording used to facilitate the short-listing process:

- **Education and Experience:**
 - Grade 12 or equivalent, such as: British Columbia Adult Graduation Diploma (BCAGD), General Education Development (GED) or Canadian Adult Education Credential (CAEC).
 - One year experience in a front-line customer service environment.
 - Six months' experience in each of the following:
 - Using computer-based software and programs (e.g. Microsoft Office Suite).
 - Providing clear and concise verbal and written communication.
 - Reviewing information and using resources to make independent decisions.
 - An equivalent combination of education and experience may be considered.

Preference may be given to candidates with one or more of the following:

- Experience making decisions within established corporate guidelines, legislation, or policy.
 - Experience working in a contact center environment.
 - Additional years of experience in any of the above requirements and/or preferences.
- **Knowledge, Skills, and Abilities**
 - Knowledge of eligibility and ongoing reporting requirements of *Widget Grant Act*
 - Ability to comfortably manage client interactions on the phone to a positive outcome.
 - Ability to provide service to a diverse range of clients.
 - Ability to convey information clearly and concisely in written and verbal form.
 - Ability to comfortably use computer-based software and programs such as databases, Microsoft Office suite, and collaboration tools.

ANALYSIS

SHORT-LISTING ERRORS BY TYPE

The OMC's audit methodology categorizes errors by type. In the short-listing stage there are three error types: design, application, and compliance.

"Design" errors relate to the short-listing criteria. An error may be identified if the criteria are not clear or relevant to the position, or if the criteria are not easily identifiable in the application documents. Design also considers if the method chosen for short-listing is objective and designed to ensure those who advance to the next phase of the process meet the minimum qualifications as outlined in the job posting. Some examples are provided later in this study. For the period examined, design errors accounted for only 11% of all short-listing errors. Notably, 39% of the design errors occurred in the 2023/24 audit year.

One common error is that the hiring panel does not consistently apply the criteria they advertised. For the period examined, these types of errors accounted for 276 (89%) of the 310 short-listing errors.

"Application" errors relate to how the hiring panel applied the short-listing criteria during short-listing. Errors are frequently identified when the hiring panel does not consistently use the advertised criteria. A more detailed description of these errors is provided later in this study. For the period examined, these types of errors accounted for 276 (89%) of the 310 short-listing errors for the five-year period.

"Compliance" errors can occur when it is not apparent that education and experience are considered as part of the competition. This type of error is rare. Only two compliance errors were identified in the five years studied. Both occurred in 2023/24. Compliance errors accounted for less than one percent of total short-listing errors and are not the focus of this study.

Table 1 - Design and application errors by audit year

Audit year	Design	Application
2019/20	5	57
2020/21	3	42
2021/22	6	67
2022/23	6	42
2023/24	13	67
Total Errors	33	275

Design errors

As noted in the previous section, in reviewing “design” at the short-listing stage, the audit program considers whether short-listing criteria are clear, relevant to the position and readily identifiable in the application documents. It also considers whether the short-listing method is objective and structured to ensure those who advance to the next stage of the process meet the minimum mandatory qualifications as outlined in the job posting.

For example, it may be considered a design error if there was an attempt to assess knowledge, skills, or abilities (KSAs) only by reviewing application documents (such as resumes). While some KSAs such as typing speed can be considered at the short-listing stage by asking for typing test results, or knowledge of a specialized field can be confirmed by a professional designation, most KSAs cannot be reliably, consistently, or fairly assessed during short-listing and are best considered later in the process when they can be more accurately assessed.

During the period examined, the most common design error identified (44%) was a marking scheme that allowed applicants who did not meet the minimum mandatory qualifications to advance in the hiring process. This can be the result of a poorly planned and designed self-assessment questionnaire, or a point-scored short-listing process where the pass mark allows applicants who may not fully meet all mandatory qualifications to move forward in the process.

As mentioned in the discussion of MNA findings, this type of error resulted in two MNA findings in 2023/24. An example is below:

Example: Design marking scheme error

The point-based method used to short-list applicants resulted in individuals obtaining a sufficient score to advance to the next stage despite not having demonstrated one or more of the posted mandatory education or experience criteria. Using an approach to short-listing that does not require applicants to possess the minimum requirements could result in an unqualified candidate being successful. In this case, five candidates were advanced who the panel determined did not meet one or more of the posted mandatory experience criteria, including an appointed candidate who did not demonstrate specific experience in “X.”

Application errors

In reviewing the application of short-listing criteria, the audit program methodology considers whether:

- There is a reasonable basis for evaluating each applicant;
- The short-listing criteria were applied consistently and objectively across the applicants resulting in a logical determination of whether applicants possess the mandatory (and, if used, the preferred) qualifications; and
- The short-listing result is clear, fair, and correct.

The 2023/24 audit year had 67 application errors. Three kinds of application errors accounted for 57 of all the errors. These warrant closer examination:

- Situations where applicants are given special consideration;
- Mistakes or oversights resulting in applicants being treated inconsistently; and
- Decisions by the hiring panel to apply criteria differently from or in addition to the posted short-listing criteria. This group includes what is described as a “lessened qualifications” error.

Applicants given special consideration

This type of error accounted for 11 errors in the 2023/24 audit year. This error occurs when the hiring panel treats an applicant differently (usually more favorably) than other applicants. This is not considered to be fair and consistent treatment of applicants.

Example: Application – special treatment

The audit found that the successful candidate was short-listed and appointed despite not clearly meeting the posted requirement of one year of administrative support experience. The panel justified the decision based on their personal familiarity with the candidate's work ethic and abilities and agreed to reevaluate and reapply the screening criteria. However, this approach compromised fairness and merit, as other applicants may have been deterred by the original qualification, and decisions based on personal knowledge undermined the integrity of the process. The conclusion was that the candidate received special treatment.

Mistakes and oversights

This type of error accounted for 19 errors in the 2023/24 audit year. This occurs when there is a mix-up in applicants, or inadvertent (versus deliberate) inconsistent treatment of applicants acknowledged by the hiring panel during the audit process. This can result in unqualified applicants being advanced or qualified candidates being disqualified. Some examples are below:

Example: Advanced in error

The audit found that a candidate who did not meet the mandatory experience requirements was mistakenly short-listed. The job required two years of related experience for someone with a degree, but the candidate had only 15 months. The hiring manager agreed it was an error, but since the candidate did not complete the next stage and withdrew, its effect on the competition's final outcome was mitigated.

Example: Eliminated in error

The job posting listed specific experience requirements, but one qualified applicant was excluded from the shortlist. The reason given was that their experience was mostly from outside British Columbia, and the role involved advising on British Columbia government compliance. However, the job ad did not require or prefer British Columbia-specific experience. After reviewing the situation, the hiring manager acknowledged it was a short-listing error and agreed the applicant should have moved forward in the process.

Different criteria applied than advertised

This group of errors accounted for 40% or 27 of the 67 application errors. Generally, these errors result when the hiring panel screens for qualifications that are different than those in the job notice. This group includes the application of "lessened qualifications". Lessened (or "relaxed") qualifications occur when hiring managers accept less than the advertised requirements.

Lessened qualifications errors were identified 22 times and resulted in findings of “merit not applied” on five occasions.

Example: Lessened qualifications

The audit found that the mandatory qualifications in the job posting were not properly applied. Only six of the 20 short-listed candidates clearly met the requirement of completing a legal assistant program along with administrative experience. Seven others, including one placed on the eligibility list, had unrelated education and legal experience. The hiring manager had lowered the short-listing criteria to include anyone with administrative experience. Other applicants might have applied had they known a lower level of requirements would be accepted. Ultimately, someone who did not meet the posted minimum requirements was found qualified and placed on the eligibility list for potential future appointment.

This group of errors also includes evaluating applicants on qualifications not stated in the posting. An example is below:

Example: Unstated qualification

Two applicants were advanced despite not possessing the required "degree, diploma or certification in administrative law, investigation and enforcement, criminology or a related field." The hiring manager explained that they had considered training from a recognized policing agency/service as equivalent to certification in investigation and enforcement. While it is reasonable to accept an equivalency, if the requirement for equivalent combinations of education and experience had been advertised, other qualified individuals may have applied.

Special Study – Lessened Qualifications 2023

The 2023 special study on lessened qualifications considered audit years 2015/16 to 2020/21. That report indicated that the annual merit performance audits noted concerns over time with the frequency of this error because over the five-year period reviewed, an average of 14% of audited appointment had issues with lessened qualifications.

As noted above, lessened qualifications accounted for 22, or 11%, of the 197 errors identified during the 2023/24 audit year. Of the 272 appointments audited, 8% of the appointments had lessened qualifications short-listing errors.

While there has been a notable reduction in the percentage of audited appointments where this type of error occurs, from an average of 14% as reported in the 2023 special study to the 8% of audited appointments in 2023/24, this type of error continues to occur regularly. The impact of this error on merit-based hiring continues to be a concern.

Conclusion: Observations on error types

- Design errors account for a small number of the short-listing errors. The most serious of these errors is associated with a flawed marking scheme, which can result in applicants who do not meet mandatory qualifications, moving forward in the process.
- Significantly more errors occur in the application of short-listing criteria during screening. Application errors account for 89% of the short-listing errors. These errors impact fairness because criteria or qualifications are not consistently and objectively applied to applicants and negatively impact transparency.
- The majority of short-listing errors flow from discretionary decisions made by the hiring panel. Hiring panel judgment, rather than administrative errors, is the source of most errors at this stage of the hiring process.
- While the underlying factors that result in a hiring panel varying from the posted short-listing qualifications are not completely understood, it often appears to be less-than-optimal language in the posting combined with decisions made during the process to ensure the competitive process moves forward. These decisions do not always adequately consider the impact on merit.

Discretionary decisions of the hiring panel result in most of the errors observed in the short-listing process.

The next section of this study considers other factors, whether they impact short-listing errors, and if so, in what way.

FACTORS IMPACTING SHORT-LISTING ERRORS

In order to assess what variables might affect the prevalence of short-listing errors, several factors of a competition have been evaluated. These factors are:

- bargaining unit status (included or excluded);
- applicant restrictions;
 - internal vs external
 - competition restrictions
- competition type (expression of interest and regular);
- competition size (number of applicants);
- position classification; and
- use of self assessment questionnaires.

Some of the variables that are analyzed below appear to impact the prevalence of short-listing errors, either negatively or positively. Other variables below that the OMC predicted would have an impact do not appear to impact short-listing outcomes.

Bargaining unit status: included/excluded

Appointments can be for positions included in a bargaining unit (union), or for positions that are excluded from a bargaining unit (i.e. typically management positions). Based on the number of included competitions (79%), it could be assumed that included competitions would have a much higher rate of short-listing errors than excluded competitions. The data, however, indicates a similar rate of error in both groups.

Table 2 – Short-listing errors by union status

Position type (representation in total sample)	No short-listing error	Short-listing error
Excluded (284 competitions, 20.9%)	234 82.4%	50 17.6%
Included (1073 competitions, 79.1%)	878 81.8%	195 18.2%
Total (1357 competitions)	1112 81.9%	245 18.1%

Applicant restrictions: internal/external

Of the appointments audited, 21.3% were limited to internal applicants, while 78.7% were open to both internal and external applicants. More short-listing errors were found in the competitions open to external applicants. In contrast, internal-only competitions had fewer short-listing errors—below the overall average of 18.9%. This could be due to the larger number of external competitions, which had a greater impact on the overall results.

Table 3 – Applicant restrictions vs. short-listing errors

Area of Competition (Representation in Total Sample)	No short-listing error	Short-listing error
Internal applicants only (286 competitions, 21.3%)	251 87.8%	35 12.2%
Open to external applicants (1055 competitions, 78.7%)	836 79.2%	219 20.8%
Total (1341 competitions)	1087 81.1%	254 18.9%

Applicant restrictions: other

Competitions can be posted with additional restrictions to the eligible applicant pool beyond limitation to internal applicants (applicant status). Examples may include restricting a competition:

- to a geographic area,
- to an organizational unit, or
- to a particular classification of employees.

Of the 1,341 appointments noted above, only 162 (12%) of appointments resulted from a competition with an additional restriction. Of the 162 appointments, OMC audits identified short-listing errors in only 18 (11.1%) appointments.

As demonstrated in the data below, appointments without a restriction have a higher rate of short-listing errors. This may occur because the restrictions result in smaller applicant pools, and the restrictions are usually quite specific and simpler to apply during screening. These factors may lead to a lower rate of short-listing errors.

Table 4 – Competition restrictions vs. short-listing errors

	No short-listing error	Short-listing error
Restriction (162 competitions, 12.1%)	144 88.9%	18 11.1%
No Restriction (1,179 competitions, 87.9%)	887 75.2%	292 24.8%
Total (1,341 competitions, 100%)	1031 76.9%	310 23.1%

Expressions of interest versus regular competitions

“Expressions of interest” (EOIs) are hiring competitions that are restricted to specific groups of people, including by divisions, branches, ministries, or even geography. Hiring managers sometimes take this approach instead of advertising centrally to all government employees and external audiences (i.e., the public) through the website of the BC Public Service Agency. EOIs are typically advertised via emails or intranets and supported within an organization without central human resources support. As evident in the table below, a comparison between the audit results of EOIs and regular competitions reveals little difference between EOI competition audits and regular competition audits with regard to short-listing errors. This data is encouraging since the [2022/23 Merit Performance Audit Report](#) made a recommendation regarding EOIs after observing a negative trend with this type of competition: “Ensure the hiring processes and documentation for “expressions of interest” competitions are approached with the same rigour as for any other competition.”

Table 5 – Expression of interest vs. short-listing errors

	No short-listing Error	Short-listing Error
Expressions of Interest (104 competitions, 7.7%)	79 75.9%	25 24.1%
Regular Competitions (1253 competitions, 92.3%)	968 77.3%	285 22.7%
Total (1357 competitions, 100%)	1047 77.2%	310 22.8%

In December 2024, the deputy minister to the Premier announced a series of hiring pauses in government ministries. This largely restricted competitions to internal candidate movement only. Considering the current direction regarding the hiring pauses within core government, it is anticipated that there may be an increased number of EOIs going forward. The OMC will closely monitor the upcoming audit cycle for any sign of significant increases in EOIs with relation to the percentage of short-listing errors and any increases or change to the percentage of short-listing errors when compared to regular competitions.

Competition size

All competitions were grouped into categories depending on the number of applicants. The overall percentage of competitions with short-listing errors was 18%. For both small and extra-large competitions, the percentage of short-listing errors was below average. It is interesting to note that even though there were almost 600 small competitions audited over the five-year period, accounting for 44% of competitions, these competitions had the lowest percentage of short-listing errors.

It may be assumed that the competitions with the highest number of applicants (over 100) would be most likely to contain a short-listing error. However, as demonstrated in the data below, only 17% of extra-large competitions had a short-listing error. In the five years sampled, the medium and large competitions contained the highest percentage of short-listing errors.

Table 6 – Competition size vs. short-listing errors

Competition Size Number of applicants Representation in total sample	No short-listing error	Short-listing error
Small (<20) (598 competitions, 44%)	514 86%	84 14%
Medium (21 – 50) (347 competitions, 25%)	264 76%	83 24%
Large (51 – 100) (205 competitions, 15%)	159 78%	46 22%
X-Large (>100) (220 competitions, 16%)	183 83%	37 17%
Total (1,369 competitions)	1120 82%	250 18%

Job classification

The study found that job classification does appear to have an impact on the rate of short-listing errors. Specifically, analysis of the 161 job classifications in this study shows that some classifications have a higher percentage of short-listing errors. Classifications are grouped into nine similar job types as outlined in the table below.

- In most of the classification groups, the short-listing error rate aligns closely with the average overall finding.
- In two classifications, the error rate was lower than average:
 - Enforcement and Corrections
 - Health, Education, and Social Work
- Three classifications had the highest rate of short-listing errors:
 - Information Technology
 - Administrative Support
 - Senior Administration and Research

When looked at more closely, the data indicates that certain job classifications are responsible for more short-listing errors than would be expected based on the proportion of how many appointments of those job classifications are audited. As outlined in Table 7, competitions for positions in information technology, finance and economics, and senior administration and research areas are a relatively small percentage of all positions audited. However, they have significantly more short-listing errors than positions in other job classification groups.

This is evident in the information technology positions that account for 4.6% of audited positions but resulted in 23.5% of short-listing errors. In contrast, enforcement and corrections positions accounted for 5.2% of audited positions yet only made up approximately 4.1% of the short-listing errors.

Table 7 – Classification vs. short-listing errors

Job classification (representation in total sample)	No short-listing error	Short-listing error
Information Technology (64 competitions, 4.6%)	49 76.5%	15 23.5%
Administrative Support (383 competitions, 27.6%)	297 77.5%	86 22.5%
Senior Admin & Research (172 competitions, 12.4%)	135 78.5%	37 21.5%
Finance & Economics (52 competitions, 3.7%)	43 82.6%	9 17.4%
Other¹ (53 competitions, 3.8%)	44 83%	9 17%
Management Band (226 competitions, 16.3%)	188 83.2%	38 16.8%
Science & Technical Officers (167 competitions, 12%)	141 84.4%	26 15.6%
Health, Education & Social Work (196 competitions, 14.1%)	178 90.8%	18 9.2%
Enforcement & Corrections (73 competitions, 5.2%)	70 95.9%	3 4.1%
Total (1386 competitions)	1145 82.6%	241 17.4%

Self-assessment questionnaires

Application requirements vary from competition to competition. Some competitions require a cover letter and resume, while others may also require a self-assessment questionnaire (SAQ) to be filled out by the applicant (with or without a cover letter). There are two types of SAQs: “basic,” where applicants provide a yes or no answer, and “comprehensive,” where applicants provide who, where, why and how answers, usually restricted to 200 words or less.

In 2015, the OMC completed a [special study on the use of questionnaires](#). The OMC observed an increase in the use of self-assessment questionnaires as a short-listing tool and observed the continued frequent use of the tool. Because short-listing is generally the first step in a selection

¹ The classification of “other” shows just below the average of short-listing errors. This classification is a combined value from legal counsel and trades and operations. It is difficult to make effective observations with this classification, as it represents 53 audit findings from a range of types of positions.

process, appropriate or incorrect use of SAQs could potentially have significant impact on merit-based hiring processes. The study found that in 2014/15, 45% of competitions used some form of SAQs. The study also noted that the introduction of qualification grids and free text questions to the SAQ tool mitigated some of the risks associated with the use of SAQs.

Based on a literature review, the study made four recommendations:

Ways to mitigate risk posed by self-assessment questionnaires:

- Use as a short-listing tool only
- Use for positions with easily-defined, straightforward qualifications
- Formulate clear questions and response options
- Verify information where practical (page 3)

More than a decade after that study, SAQs continue to be used as a tool in short-listing.

Of the 1,369 audited appointments from 2019/20 to 2023/24 audit cycles:

- 1,034 (75.5%) continued to require an SAQ as part of the application process.

A review of the 272 appointments audited in 2023/24 showed that:

- 220 (80%) continued to require an SAQ as part of the application process.

Table 8 demonstrates a correlation between the use of SAQs in short-listing and a lower number of short-listing errors.

Table 8 – SAQ vs. Short-listing errors		
	No short-listing error	Short-listing error
SAQ (1034 competitions, 75.5%)	856 82.8%	178 17.2%
No SAQ (335 competitions, 24.5%)	203 60.6%	132 39.4%
Total (1369 competitions)	1059 77.4%	310 22.6%

Notably, in the 2023/24 audit year, only two errors were identified that were related to using a SAQ.

- In one competition, an applicant indicated they had a qualification when they did not. The hiring panel relied on this response and did not review the resume to verify the response. As a result, an unqualified applicant moved forward in the process.
- In another competition, both the questionnaire and the posting erroneously included qualifications that were not required for the position and could not be verified through screening. These qualifications were not considered by the hiring panel during screening.

Based on this review, it appears that the current use of SAQs as a short-listing tool does not pose a significant risk to merit-based hiring. In fact, a review of a longer period indicates that use of SAQs may potentially assist in reducing the likelihood of short-listing errors impacting merit.

Conclusion: Observations on factors impacting short-listing errors

In the audited competitions,

- There was no significant difference in short-listing errors between:
 - included or excluded positions;
 - applicant restriction (open to all applicants or restricted to internal only applicants); or
 - the competition type (EOIs versus regular competitions).
- Competition size had some impact on the likelihood of a short-listing error occurring in the competition. Medium and large sized competitions both had an above-average rate of short-listing errors (24% and 22% versus the 18% average). Conversely, the small (under 20 applicants) and extra-large competitions (100 applicants or more) fall below the average for short-listing errors (14% and 17% vs. the 18% average).
- Short-listing errors appear more frequently when a SAQ is not used (Table 8).
- Some job classifications show a much higher number of short-listing errors than others (see Table 7).
 - Administrative support positions had the highest number of appointments (383) in the last five audit cycles and also one of the highest rates of short-listing errors (22.5% versus 17.4% average).
 - Information and technology competitions as well as senior administration and research competitions had proportionally more short-listing errors; they made up a small number of audited positions, but accounted for significantly more short-listing errors (Table 7). Management band positions had the next highest number of appointments (226) in the last five audit cycles but were below the average rate of short-listing errors (16.8% vs 17.4% average).
 - The enforcement and corrections group, who annually complete many of the extra-large competitions of 100 or more applicants, had the lowest percentage of short-listing errors (4.1% versus 17.8% average) over the last five audit cycles.

CONCLUSION AND RECOMMENDATIONS

In the *2023/24 Merit Performance Audit Report*, the Merit Commissioner made the following recommendations in relation to short-listing:

1. Educate hiring managers about how to conduct short-listing fairly, consistently, and in accordance with the mandatory posted education and experience job requirements.
2. Review all job requirements criteria (qualifications) used for short-listing and assessment *prior to* posting a competition to ensure relevancy and accuracy for the role being filled.
3. Define “equivalent qualifications” in competitions where they may be accepted (education and/or experience) *in the job posting*.

These three recommendations continue to be relevant. Organization heads are encouraged to make these a priority in their efforts to improve hiring in their respective organizations, to avoid the types and rates of short-listing errors that have been described in this study.

In addition to reinforcing these earlier recommendations, the findings from this study suggest some additional recommendations specific to hiring manager training and support:

- Hiring managers appear to make more errors when hiring for some position groups, including administrative support, information and technology, and senior administration and research. Consideration should be given to targeted training for hiring managers who primarily recruit to those groups.
- Organizations may benefit from looking more deeply at these position groups to better understand why shortlisting problems arise. They may wish to conduct a needs analysis to help them develop more effective training. A needs analysis may also reveal other factors related to shortlisting challenges, such as classification practices or hiring culture, that need to be addressed.
- Educational resources related to shortlisting exist for BC Public Service employees, such as the “Screening Guidelines” available for government hiring managers on MyHR. Changes may be needed to increase awareness of the guidelines or to them more easily understood by hiring managers.

RESPONSE FROM THE BC PUBLIC SERVICE AGENCY



Where ideas work

July 25, 2025

CLIFF #8154

David McCoy
Merit Commissioner
Office of the Merit Commissioner
Suite 502 – 947 Fort Street
Victoria BC V8W 9A3

Dear David McCoy:

Re: Shortlisting Special Study

Thank you for the opportunity to respond to the Merit Commissioner's special study examining the short-listing stage of the hiring process within the BC Public Service.

I appreciate the Commissioner's detailed analysis, and the identification of trends and challenges related to merit-based hiring. The report's findings underscore the critical importance of strong design and consistent application of screening criteria in hiring competitions.

We welcome the study's recommendations and view them as aligned with existing and upcoming efforts to improve staffing practices. These include targeted training initiatives, clearer guidance on short-listing expectations, and tools that reinforce merit-based decision-making from the outset of the hiring process.

As part of our continuous improvement efforts, we are committed to:

- Reinforcing the importance of adherence to posted minimum qualifications during short-listing;
- Promoting the consistent and appropriate use of tools such as self-assessment questionnaires, which the report notes are correlated with fewer short-listing errors;

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- Ensuring hiring managers have access to accessible, up-to-date resources that promote fair, consistent, and transparent screening practices.

We recognize that the integrity of the merit-based hiring process relies on strong, consistent practices throughout the competition process to ensure fairness, transparency, and public confidence.

Yours sincerely,

A handwritten signature in black ink, appearing to read "Deb Godfrey".

Deb Godfrey
Deputy Minister
BC Public Service Agency