SPOT Briefing
(Search Procedures, Operations, & Tasks)
for
Tenure-Track & Temporary Faculty Searches

Fall 2014
PowerPoint narration
1. Hello, and thank you for taking the time to view this presentation on
the SPOT, which stands for Search Procedures, Operations, & Tasks. The goal of
the presentation is to provide department chairs and search committee chairs
with the information necessary to get started on your searches. Most of the
items in the presentation are detailed in the Guide to Faculty Searches handbook.
The handbook is also available on the Faculty Search Information website.

(2) The Guide to Faculty Searches is an extremely comprehensive guide and
a great resource for you as you navigate the complicated tenure-track faculty
search process. It provides guidance for temporary faculty searches as well.

There are 3 parts to the handbook:

1. The first part covers Academic affairs guidelines for faculty searches. It has
   an appendix with required forms and other resources.

2. The second part covers Social Equity guidelines. It also includes an
   appendix with forms and resources.

3. The third part is the PeopleAdmin hiring Managers User’s guide. As you
   know, PeopleAdmin is the software that we use to manage the search
   process. More detail about that later.
OK, first some basics.

Most likely, each department has policies and procedures for conducting faculty searches. If the policies and procedures don’t exist, it is recommended that the department chair work with the faculty to establish them. One of the policies should state the requirement for regular full-time department faculty to vote to recommend qualified applicants for possible hire. Other policies might include who attends presentations, whether a faculty member has to attend all presentations in order to vote, etc.

In PeopleAdmin, the Hiring Manager is the name assigned to the chair of the search committee. The Hiring Manager MUST be a tenured faculty member.

While your department secretary may be given access to PeopleAdmin, the Hiring Manager cannot be the department secretary.

The department chair has a role that is separate from the search committee. He/She cannot serve on the search committee and should abstain from participating in any meetings or deliberations or in influencing the committee in any way. The department chair separately interviews the candidates during the onsite visit and makes a separate recommendation in writing to the Provost.
so, let’s talk about the search committee. There are several guidelines for you to follow.

First, you need to have an odd number. This eliminates the possibility of a tie vote.

As mentioned before, the hiring manager, which is the PeopleAdmin name for search committee chair, must be tenured – no exceptions.

It’s important to find people for the committee who can commit to the whole process from initial ratings through the on-campus visit to final recommendation. It’s a time consuming process, as we all know.

The department chair is not on the search committee. As mentioned earlier, the dept chair has his/her own processes.

Each search committee is required to include an EEO representative. This person can come from inside or outside the department. The role of the EEO rep is to ensure an equitable search. As many of you know, last year we instituted the Faculty Search Diversity Roster, where faculty were trained in diversity issues related to conducting an equitable search process. These faculty are available to be on search committees as the EEO representative. You can find the roster on the Faculty Search Info website.
Some of you are familiar with PeopleAdmin, the software that the university uses to manage the faculty search process. Part 3 of the Guide to Faculty Searches has detailed instruction about how to use the features of PeopleAdmin. There is also an online training video that you have access to. See page 7 in the handbook for instructions.

For assistance with PeopleAdmin, Eric Guiser, interim director of HR, is your man.

So, once you’ve received word that your position has been approved, the first task is to create the posting in PeopleAdmin. At first this process can appear as a little daunting, but once you get the hang of using it, it becomes easier (not).

There are 3 steps to creating the posting in PeopleAdmin.

Inside PeopleAdmin there is a faculty template that you use to create the posting. But before you create it there, use the Microsoft word document templates provided. See the appendix page 17. The forms can be downloaded from the Faculty Search Information website. There is standard language in both the word document and PeopleAdmin that has to stay there. You add department specific information. More details about that later.
The ad copy is a short version of the job description. It is used for ads in journals, websites, etc. There’s a sample on page 18. It also has to go through the approval process (emailed to me and Dr. Burnett), then it can be uploaded into PeopleAdmin under the documents tab. More about that later, too.

X Second step – email both documents (the job description and the short ad copy) to the Faculty Search coordinator and to Dr. John Burnett in Social Equity for approval.

X Once approval is received, you can begin to input the job description into PeopleAdmin.

(8) X Let’s take a look at how to use the MS Word job description template. I make the distinction between the Word template and the PeopleAdmin template. You’ll input your position information in the Word template first, then copy/paste into PeopleAdmin template.

You’ll be entering text into expandable text boxes. For assistance with creating the job description, there is sample language in the appendix that should be helpful. The requirements should be described carefully and accurately. You
want the requirements to be specific enough that there are no questions about them, but general enough to cover all bases.

Finally, please note that there is no need to request reference letters until the end of the process. Applicants will upload their reference contact information.

(9)  For the Job title, enter tenure track faculty, then the name of the department, program or discipline

For the Position type/salary – enter the department name

For the job summary/Basic Function – this is the place where you describe what the position entails. You can enter discipline specific content area and labs, whether the position requires intern, practicum, or student teaching supervision, will there be any accreditation or outcomes assessment work involved, any online or off-campus teaching required, any travel required, and any other applicable duties.

10  Under required skills, knowledge, & abilities, describe all that would be required and preferred. Include here any special certifications, prior experiences, dispositions, and others.
Generally, a terminal degree is required for all tenure-track positions. In most cases that means a doctorate. The language you use depends on if you are requiring the degree at the time of application, or after application but prior to hiring. Deans/Provost approval is required for exceptions.

11 X Save the job description as the name of your department and the words job description. For example, Social Work job description. Then email it to both the faculty search coordinator and social equity officer for approval.

12 X The short Ad copy template is simpler. All you need to do is replace the highlighted text with appropriate language for your position, save it as Dept name ad copy, and email it to both the faculty search coordinator and social equity officer for approval.

Once the job description and short ad copy templates are completed, email both of them to the FSC and Soc Eq for approval. You will receive an email reply back from both of them.

(13) X After both of these are approved, you may begin to create the posting in PeopleAdmin. In addition to the creating the job description, you must
also upload the following documents: job description, short ad copy, diversity recruitment plan, and the space utilization form.

(14) X Let’s focus on creating the posting.

In the PeopleAdmin section of the Guide to Faculty Searches, there are directions for creating a posting. Contact HR if you don’t have a PeopleAdmin account.

You’ll need to follow the directions in the PeopleAdmin manual to create a posting from Template. Choose the Tenure Track faculty template.

You’ll be entering posting details directly in the template. You can copy/paste details from the Microsoft WORD template, and complete all required fields.

Under the section where you have to check required documents, the usual ones that you select are letter of application, CV, transcripts, reference info (which would be in other), teaching philosophy, and any special credentials such as certifications or licenses, where applicable.

Don’t forget to Save as you go.
After you’ve entered the job description, the next step is to attach the 4 approved documents mentioned earlier: job description, ad copy, diversity recruitment plan, and space utilization request.

The diversity recruitment plan is completed outside of PeopleAdmin and submitted to Social Equity for approval. This is a requirement of the Social Equity Office. The blank form can be found on the Faculty Search Information website.

The Space Utilization request is completed by the dept chair and sent for approval outside of People Admin following the approval procedures.

Make sure to time these approvals with the creation of the posting in PeopleAdmin.

Be very careful about using specific questions and qualifying points. Sometimes this may limit your pool too much. Using these options is not recommended.

Posting approval process

Once all of this information is entered, the posting has to go through the approval process in PA. Following the manual, the Hiring manager submits it to Faculty only: dept head, which is PeopleAdmin’s way of saying dept chair.

Once you send it on, you can’t go back in to change it. Any changes will have to be made through Eric in HR.
The Department chair forwards it to the department head/Dean.

The dean forwards it on to be approved by the VP/Provost, to the controller, the budget officer, vp admin/finance, president, HR, social equity.

After approval, the Provost notifies Social Equity, the FSC, and the Deans. The Deans will notify the department chairs. HR posts the approved opening.

17 XX Social Equity plays a major role in the search process. They make sure that searches follow the EEO law and that search committees do as much as they can to achieve a diverse pool of applicants. Social Equity does this in a number of ways.

X The administrative diversity recruitment plan – outside of PeopleAdmin, the Hiring Manager prepares the Admin Div Rec Plan. There’s a copy in the appendix of the Guide to Faculty Searches. You can see the types of recruitment activities that are required. If you had a recent search, you may be able to incorporate some of the activities from the previous plan. This plan is submitted to the Office of Social Equity for approval before you can post the job description on PeopleAdmin.

X Social Equity also advertises and recruits for Diversity.

X The office reviews all postings, interview questions, ratings, and processes.
They also collect all documentation after the search. Hiring managers must turn in all materials at the conclusion of the search.

18 X FACULTY SEARCH COORDINATOR

The faculty search coordinator places the group advertisement in the Chronicle of Higher Education. There’s a sample in the appendix.

As noted before, the faculty search coordinator reviews all postings, interview questions, ratings, and processes. The FSC also monitors the search timeline. You’ll be provided with the timeline at the SPOT training.

19 XX There are a variety of strategies used for advertising and marketing the positions. This ensures the best pool of diverse highly-qualified applicants.

X Social Equity conducts diversity-focused advertising and recruitment efforts for all searches.

X The faculty search coordinator is responsible for the ad that appears in the Chronicle of Higher Education.

X Departments may advertise in discipline-specific websites and journals. The approved job description or short ad copy can be used for this purpose. There are free sources for advertising, including your professional associations and the personal contacts that you have.
The ones that are not free must be approved by the Dean through SAP. Work with your clerical staff to have the purchase requisitions completed for the ads. This process must be used for Websites that charge a fee as well as other electronic media. More detail is provided in the Guide to Faculty Searches.

20 XX So, now you’re all set. The posting is up, the ads have been placed, and you’re ready to receive applications. What’s next?

X Remember that the applications are accepted online only through PeopleAdmin.

X All of the application items have to be completed (that means that the applicants have submitted all the required paperwork) and

X the files are uploaded electronically.

X Unofficial transcripts are ok at application but official transcripts will be required for the on-campus interview. Uploading unofficial transcripts are tricky. Applicants need to put all transcripts in one pdf file and then upload the one file. Sometimes the pdf files are too big so they end up sending them.

21 X As far as when to start rating the application materials, different departments do it different ways. Some will review them as they come in; others wait until the deadline date before reviewing any. It’s really up to you.
Here’s an overview of the process of reviewing applicants.

X There are standard, customizable matrix forms that can be used for the processes in Phases 1, 2, and 3 of the search process.

X Permission is required for each phase.

X After each phase is completed, the hiring manager updates the applicants’ status in PeopleAdmin.

X PeopleAdmin automatically sends out emails – the committee sends out NO letters or emails.

22 XX There are several things that the Hiring Manager/Search committee chair must do before beginning Phase 1, the initial review/screening.

X The Phase 1 form must be approved by the faculty search coordinator and Social Equity prior to use. Once you adapt the form to reflect your qualifications, matching the position description, email it to the faculty search coordinator and Social Equity. In return, you will get a response back from both. At this point you can begin the review.

X You have to change the status of all the applicants to “under review by committee” in PeopleAdmin.

X you’ll need to activate a guest user account by establishing a password, and
Finally, you’ll need to notify your committee that the applications are ready for review and supply them with a copy of the Phase 1 form.

Here’s an example of a completed Phase 1 form.

Notice, in pale yellow, how the qualifications from the job description are placed on the form.

All search committee members evaluate the credentials of applicants using the Phase 1 form. Each committee member has to fill it out, including comments. All you have to do is write yes or no in each cell for each individual. Then make a judgment that the person is not qualified, minimally qualified, highly qualified, or outstanding. Indicate if the applicant is recommended for a phone interview, and, finally, write comments. Comments are very important, as they help document why one applicant is more qualified than the other.

After Phase 1 is completed, the hiring manager compiles the Phase 1 form and emails it to the faculty search coordinator and Soc Eq and requests permission to move to Phase 2. The faculty search coordinator and Social Eq will each notify the hiring manager when permission is granted.

Here’s an example of a completed Phase 1 form.

Phase 2 Phone/SKYPE interviews. New this year, we are encouraging you to utilize technology to narrow the applicant pool. Most people have access
to SKYPE, so we want you to use it for PHASE 2. It’s been done successfully with the FDI scholar searches and other searches in the past. This way you can limit the number of applicants that have to come to campus. If you don’t have a room that will facilitate a SKYPE communication, please contact the Faculty Search Coordinator. To be equitable, all phone interviews must be conducted by SKYPE. What I mean is you can’t do 2 on SKYPE and one on the phone.

X There’s a Phase 2 phone interview form that is customizable. Again, the Phase 2 form must be approved by the FSC and Soc Eq. Email them to both people, and you will be notified by each with approval. X Here’s a sample of a Phase 2 form.

There’s guidance about interview questions in Appendix 2.

X As with Phase 1, the questions are adapted from the job description.

27 X Once approval is received, the hiring manager can schedule the SKYPE interviews. Note the guidelines on page 9 #3. X Recording interviews is prohibited. The blank Phase 2 form is used for this. Each member of the committee completes a Phase 2 form during the SKYPE interviews.

X After the interviews, the hiring manager compiles one Phase 2 form and ranks the applicants. The form is sent to the FSC and Soc Eq for approval to move to Phase 3. X After the hiring manager gets approval to continue with the on-
campus interview, the hiring manager changes the status of applicants not selected for on-campus interviews to phone interviewed – not selected in People Admin. You have to select a reason from the drop-down menu. You don’t have to worry about letters – emails are automatically sent.

28 XX Here’s an example of a compiled Phase 2 form.

29 XX Phase 3 – on-campus interviews.

The Phase 3 form is used to collect the results from the on-campus interview. Again, pay attention to the guidance in appendix 2. It must be approved by the FSC and Soc Eq.

X Show form.

30 XX Once the form is approved, on-campus meetings can be scheduled by the hiring manager. Search committees are advised to plan on-campus interviews for at least 3 applicants.

X Usually oncampus visits are a day long and include class presentation, meeting with search committee and the department. The Hiring manager must schedule meetings between each applicant and the provost (or designee), Dean, and Department chair. Note the guidelines on page 11 #6. This is a Must. The search committee, faculty, administrators and students should have the
opportunity to observe the applicants’ teaching. See the Appendix H, I, J, and K for sample forms that can be used to gather input from others during the on-campus interview.

X Recording of any part of the campus interview is prohibited.

31 XX Additional information

X Transcripts – the hiring manager has to notify each applicant to bring official transcripts to the on-campus interview.

X Background check release and driver’s license – the HM notifies each applicant that he/she will be required to sign a release form authorizing the mandatory background check. You’ll need to provide the applicant with the release form (which you can find on the Academic Affairs website). These are turned in to Marisa at the time of the meeting with the Provost.

X ForTravel and hotel procedures – this is where the department secretary really comes in handy. There are Procedures for Interview applicant reimbursement in appendix 1.

X International calls and travel – travel arrangements for on-campus interviews of international applicants must be pre-approved by the President.
HMs have to submit requests with detailed cost estimates to the FSC who requests presidential approval.

X References should be checked before the applicant is recommended to the faculty. Phone calls to the referents are preferred.

32 XX RECOMMENDING APPLICANTS

X Each department may have separate procedures for tenure track or temporary faculty positions,

X but in all cases, the following applies:

The HM and the department chair work together to provide an opportunity for faculty to review/discuss the dossiers. Probably the most efficient strategy is to give them guest access to PeopleAdmin.

X The majority of regular full-time faculty must vote approval in order for the applicant to receive further consideration. X After the department vote, the dept chair sends a letter documenting the results of the vote to the Dean, FSC, and Social Equity. This is not the same as the department chair’s recommendation. This is only documenting the dept vote.

X Then, the hiring manager changes the applicants’ status in PeopleAdmin to Interviewed-not selected or Recommended for hire as appropriate. This will
trigger automatic emails from PeopleAdmin. The Hiring manager must then contact Eric in HR to forward the posting to the Hiring manager. Then the hiring manager forwards the posting to Social Equity. Social Equity will review it and then forward it on through PeopleAdmin to the Dept chair, and so on.

33 XX After the documentation of the vote is held, Academic Affairs conducts background checks on the finalists.

X The Department chair and the Dean make separate recommendations on letterhead to the Provost. They should include the dept faculty recommendation in their letters.

In PeopleAdmin, the Dept chair forwards the department-approved applicants to the Dean.

34XX The Offer

The provost establishes the finalist pool and confers with the President about the offer that is to be made. X This is where Veterans preference comes into play. Any veteran in the finalist pool must be offered the position when hiring is approved.

X Upon the President’s approval, the Dean presents the offer to the applicant and negotiates rank and salary.
When the finalist accepts the position, the hiring manager works with the department secretary to prepare the hiring form and the change to published schedule form.

When the search concludes with a successful new tenure track faculty hire, the hiring manager forwards all documentation, for example all Phase sheets and ratings, to Social Equity.

Under no circumstances should the hiring manager or department chair give any feedback to unsuccessful applicants. If you receive calls from candidates, just tell them that it is our policy not to provide this information and refer them to the email that they received from PeopleAdmin.

Once all the hiring paperwork is submitted to Academic Affairs, the President makes the official offer to the finalist with an appointment letter.

Human Resources will then change the applicants’ status to hired or rejected, an automatic email goes out to the rejected applicants, and the posting is closed.

HR changes the applicants’ status (hired or rejected), and closes the posting.