SPOT Briefing
(Search Procedures, Operations, & Tasks)
Thursday, September 5, 2019
306A Dixon Hall - 11:00 a.m.

California University of Pennsylvania
Academic Excellence, Innovation, Service, Personal Growth
Guide to Faculty Searches

Revised September 4, 2018

3 Parts to the Guide:

1. Academic Affairs Guidelines
2. Social Equity Guidelines
3. PeopleAdmin Search Chair’s User’s Guide

Faculty Search Information web page:

https://www.calu.edu/inside/faculty-staff/academic-affairs/faculty-search-information.aspx
Search Process Basics

- Department Policies/Procedures
  - Verify (or Establish if none exist)
  - Only Full-time Tenured/Tenure-Track department faculty vote

- Search Committee Chair (Search Chair)
  - Must be a tenured faculty member
Search Process Basics
(Role of the Department Chair)

- Separate from search committee
- Must not participate in search committee deliberations
- Interviews candidates separately
- Makes a separate (independent) recommendation
The Search Committee

- Odd number (3-7 members)
- **Search Chair** must be tenured
- Commitment to all phases of the search Process
- Faculty Search Diversity (EEO) representative

Current Roster: [https://www.calu.edu/inside/faculty-staff/academic-affairs/faculty-search-information.aspx](https://www.calu.edu/inside/faculty-staff/academic-affairs/faculty-search-information.aspx)

- Listed diversity rep required, actual minority preferred for searches
PeopleAdmin

- Software that manages the search process
- Manual: Guide to Faculty Searches
- Part 3: Orientation to PeopleAdmin, page 46-71 of the guide
- PeopleAdmin questions – contact Eric Guiser Director of Human Resources (Guiser@calu.edu)
First Task – Create Posting for PeopleAdmin

Three Steps:

1. Using MS WORD templates, create the job description and short ad copy
   - Academic Affairs Website ➔ Faculty Search Information ➔ Forms
     https://www.calu.edu/inside/faculty-staff/academic-affairs/
   - Ad Copy Form (Under “Forms Link”)
   - Job Description Form (Under “Forms Link”)

2. Secure approval from Faculty Search Coordinator and Social Equity

3. Input job description in PeopleAdmin
Job Description Template

- Enter text into expandable text boxes
- Job Functions (duties/responsibilities)
- Describe Skills, Knowledge, Abilities
- Minimum Education and Training
- Save as “dept. name” job description
- Email to Faculty Search Coordinator and Social Equity for approval
Ad Copy Template

- Abbreviated version of Job Description for disciplinary Journal and other Ads
- Replace highlighted text with appropriate language for your position
- Save as “dept. name” ad copy
- Send to Faculty Search Coordinator and Social Equity for approval
Creating the Posting in PeopleAdmin

- Contact HR if you don’t have an account
- Select Tenure-Track Faculty template
- Enter Approved Job description and other posting details
- Provide Diversity Recruitment Plan to Social Equity
- List reference information info needed:
  - Name, Affiliation, Phone #, Email Address
- Complete Space utilization form
  - Proposed Office Space for new hire
- Modify Email notification responses if desired
- Save as you go!
Approval Process

- **Search Chair** or **Department Chair** to Faculty Search Coordinator and **Social Equity**
- Once approved, **SC** or **DC** to **Dean**
  - Academic or Student Affairs
- **Dean** to **VP (Academic or Student Affairs)**, to **Controller**, to **Budget Officer**, to **President**, to **Human Resources**
- **Human Resources** Posts Approved Opening
Role of Social Equity in the Search Process

- Approve Administrative Diversity Recruitment Plan
- Advertises & Recruits for Diversity
- Reviews all Postings, Phases, Ratings, & Processes
- Collects all documentation (paper & electronic) at the conclusion of each search from Search Chair
Role of Faculty Search Coordinator

- Annually revises search process and documents (Timeline, SPOT briefing, Search Guide)
- Prepares multi-search ad for the Chronicle of Higher Ed
- Reviews all Postings, Phases, Ratings, & Processes
- Monitors progress and keeps things moving per “Search Timeline“
Advertising the Openings

- **Social Equity** → Diversity (group ads)
- Communication & Marketing → *Chronicle of Higher Ed*
- Department → Discipline-specific
  - Use Job Description or Ad Copy
  - Free - Professional associations - contacts - listservs
  - Not Free – *Dean* (academic or student affairs) approval (dept. cost centers reimbursed from the appropriate VP’s budget)
Receiving Applications

- Applications Accepted Online Only (PeopleAdmin)
- Every Application Item Must Be Completed
  - Files Uploaded Electronically
  - Pick from a menu of files applicants can upload
- Unofficial Transcripts with Application
- Official Transcripts required when hired – forwarded to President’s Office
Reviewing Applicants Overview

- 3 phases to the review process
  - Phase 1: Initial review/screening
  - Phase 2: Phone interview
  - Phase 3: On campus visit

- Use customizable Phase 1-3 Matrix Forms
  - [https://www.calu.edu/inside/faculty-staff/academic-affairs/faculty-search-information.aspx](https://www.calu.edu/inside/faculty-staff/academic-affairs/faculty-search-information.aspx)

- Dual permission required for each phase

- Search Chair updates applicants’ status at each phase

- Status Notification Emails automatically sent to candidates no longer considered
Search Chair Responsibilities
(Pre-Phase 1)

- Adapt Phase 1-3 forms, email to FSC and Social Equity for approval
- Search Chair changes status of applicants to “under review by committee”
- Activate guest user account for search committee
- Notify committee that apps are ready for review; Committee uses Phase 1 form
Phase 1 Example

**Phase 1: Initial Review/Screening of Applicant Qualifications**

**Position Title:** Public Policy & Public Administration

**Posting Number:** 10520

**Note:** This is an official rating form. By University policy, it must be retained by the University after the completion of the search. Please submit this form to the Hiring Manager at the end of the search.

**Applicant Name (Last, First)**

<table>
<thead>
<tr>
<th>Applicant Name</th>
<th>Ph.D. or equivalent at time of appl.</th>
<th>Experience in field of Public Policy</th>
<th>Public Admin. secondary field</th>
<th>Teaching experience traditional would teach online</th>
<th>Research: urban/rural, comp., tech., global, or race</th>
<th>Teaching: urban/rural, comp., tech., global, or race</th>
<th>Not Qualified (does not meet minimum qualifications)</th>
<th>Minimally Qualified (meets minimum qualifications)</th>
<th>Highly Qualified (meets some qualifications, exceeds others)</th>
<th>Outstanding (exceeds all minimum qualifications)</th>
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</table>

**Rating**

**Results**

**Provide a**

**Department:**

Hiring Manager: xxxxxxxx
Phase 1 Initial Review/Screening

- After review, **Search Chair** compiles all forms, emails to Faculty Search Coordinator and **Social Equity** for approval to move to Phase 2

- After approval, **Search Chair changes applicants’ status in PeopleAdmin**
  - “Not Selected for Interview” or
  - “Selected for Phone Interview"
## Phase 1: Initial Review/Screening of Applicant Qualifications

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Phase 2
(Phone/SKYPE Interviews)

- Again, **Search Chair** adapts form, emails to FSC and **Social Equity** for approval
Phase 2

- After approval, **Search Chair** schedules Phone/SKYPE interviews

- All committee members are present for interviews; no recordings permitted

- After review, **Search Chair** compiles all forms, emails to Faculty Search Coordinator and **Social Equity** for approval to move to Phase 3

- After approval, **Search Chair** changes applicants’ status in PeopleAdmin
  - “Phone Interviewed Not Selected” or
  - “Campus Interview Approved”
Phase 2: Phone Interviews

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<th>Rating (1-10?)</th>
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Position Title: Public Policy & Public Administration

Posting Number: 10520

Table: Phone Interview Questions

- Background: coursework, teaching, research
- Background: area(s) of expertise
- Teaching philosophy
- University service of interest
- Community service: current and future
- Project where will be in five years
- Questions for Search Committee

Provide detailed comments regarding each applicant's strengths/weaknesses.
## Phase 3 on-campus interviews

- Again, **Search Chair** adapts form, emails to FSC and **Social Equity** for approval.

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### Phase 3: On-Campus Interviews

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<th>Public Policy &amp; Public Administration</th>
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Phase 3 on-campus interviews

- After approval, **Search Chair** schedules on-campus interviews (3 is ideal)

- **Search Chair** solicits *reference checks* for Phase 3 candidates *prior* to the interviews

- Activities: Class presentation, search committee meeting, dept., **Dept. Chair**, **Dean** (AA or SA), VP (AA or SA)

- All committee members are present for interviews; no recordings permitted

- **Search Chair** obtains release for *background checks* during interviews and submits to the Provost’s Office (Daphne) for processing for candidates recommended for hire
Recommending Applicants

- **Search Chair** Recommends applicants to **Social Equity** in People Admin and emails **Dept. Chair**.
  - Finalists not ranked but strengths & weaknesses provided for each

- Social Equity sends recommendation to hire to **Dept. Chair**

- Dept. Faculty Reviews Credentials and Votes
  - Faculty review applicants’ credentials in PeopleAdmin
  - Only tenured/tenure-track faculty vote
  - An offer may only be made to finalists approved by dept. vote

- **Dept. Chair** provides the **Dean** (AA or SA) & VP (AA or SA) with an independent recommendation to hire and the results of department vote
Recommending Applicants

- **Dean** *informally* provides independent recommendation, outcome of department vote, and approved finalist credentials to VP (AA or SA)
  - Strengths & weaknesses of approved finalists included

- **Search Chair** changes *dept. approved finalist(s)* status in PeopleAdmin to:
  - “Recommended for Hire”

- Appropriate VP’s office coordinates with **Human Resources** to conduct background checks
The Offer

- VP (AA or SA) establishes finalist pool and confers with President about rank, salary, and range for offer
  - Veterans preference determined
- Upon president’s approval, Dean (AA or SA) makes tentative offer, negotiates rank/salary with approved finalist on or around March 5th
- When the finalist accepts, Dean forwards official recommendation, negotiated rank/salary, and supporting documentation to VP (AA or SA)
  - Including special assignment(s) desired for the appointment letter such as leadership in program accreditation or program assessment
Additional Info

- When new hires accept offers, Deans ask if eligible to teach in the U.S., remind hire to forward Official Transcripts to the President’s Office and:
  - Position offer is *conditional* to a positive background check

- Travel & Hotel Procedures
  - Departments arrange and pay from dept. cost centers
  - Candidates within 300 mile radius encouraged to drive
  - Reimbursed from Provost’s cost center
  - **One night in hotel and one meal (lunch)!**

- International Applicants
  - Travel arrangements must be pre-approved by the President
  - Detailed cost estimates submitted to Faculty Search Chair
Post-Search Procedures

- **Search Chair** works with dept. secretary to prepare "Hiring" and "Change to Published Schedule Forms" so appointment letter can be prepared.

- **Search Chair** forwards all documentation (rating sheets, etc.) to **Social Equity**.

- **Search Chair** changes Phase 3 not-approved finalist statuses in PeopleAdmin to:
  - “Interviewed not selected”
  - “Auto email sent (from PeopleAdmin) to notify not-approved finalist(s)"

- President’s appointment letter is **official offer**.

- **Human Resources** closes posting.
Questions?

Contact Dr. Len Colelli
Faculty Search Coordinator
Colelli@calu.edu or 4302