

SPOT Briefing

(**S**earch **P**rocedures, **O**perations, & **T**asks)

Thursday, September 5, 2019

306A Dixon Hall - 11:00 a.m.

CAL U

California University of Pennsylvania

Academic Excellence, Innovation, Service, Personal Growth



Guide to Faculty Searches

Revised September 4, 2018



CALU

California University of Pennsylvania
Building Character. Building Careers.

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Provost/ Vice President for Academic Affairs

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*Faculty Search Coordinator
Associate Provost*

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>
- 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:

- 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”)
- Secure approval from Faculty Search Coordinator and **Social Equity**
- Input job description in PeopleAdmin



Job Description Template

- Enter text into expandable text boxes
- See Search Guide: Appendix 1.B for sample language
- 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>
- Dual permission required for each **phase**
- **Search Chair** updates applicants' status at each phase
- Status Notification Emails automatically sent to candidates no longer considered

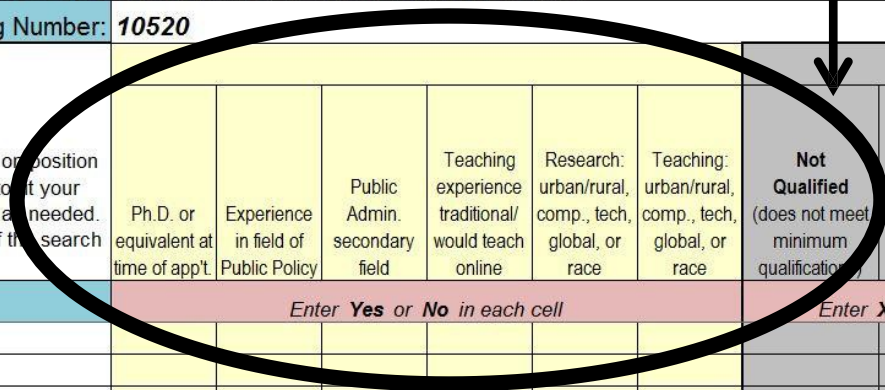
Search Chair Responsibilities

(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

A	B	C	D	E	F	G	H	I	J	K	L	
Phase 1: Initial Review/Screening of Applicant Qualifications												
<i>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.</i>												
Position Title:		Public Policy & Public Administration							Hiring Manager			xxxxxxx
Posting Number:		10520							Department			xxxxxxxx
Note: Qualifications must be based on position announcement. Adapt this matrix to suit your search. Add or delete Qualifications as needed. List <u>every</u> Applicant for each stage of the search process.							Rating				Results	
		Ph.D. or equivalent at time of app't	Experience in field of Public Policy	Public Admin. secondary field	Teaching experience traditional/online	Research: urban/rural, comp., tech, global, or race	Teaching: urban/rural, comp., tech, global, or race	Not Qualified (does not meet minimum qualifications)	Minimally Qualified (meets minimum qualifications)	Highly Qualified (meets some qualifications, exceeds others)	Outstanding (exceeds all minimum qualifications)	Applicants Recommended for Phone Interviews
Applicant Name (Last, First)		<i>Enter Yes or No in each cell</i>						<i>Enter X in ONE column for each applicant</i>				<i>Enter X</i>



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 Example (Compiled)

	A	B	C	D	E	F	G	H	I	J	K	L	
1	Phase 1: Initial Review/Screening of Applicant Qualifications												
2	<i>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.</i>												
3	Position Title: Public Policy & Public Administration							Hiring Manager: xxxxxxxxxxxxxx					
4	Posting Number: 10520							Department: xxxxxxxxxxxxxx					
5	Note: Qualifications must be based on position announcement. Adapt this matrix to fit your search. Add or delete Qualifications as needed. List <u>every</u> Applicant for each stage of the search process.							Rating				Results	C
6								Ph.D. or equivalent at time of app't	Experience in field of Public Policy	Public Admin. secondary filed	Teaching experience traditional/ would teach online	Research: urban/rural, comp., tech, global, or race	Teaching: urban/rural, comp., tech, global, or race
7	Applicant Name (Last, First)	<i>Enter Yes or No in each cell</i>					<i>Enter X in ONE column for each applicant</i>				<i>Enter X</i>		
8	xxxxxxxxxxxx	Yes	No	No	Yes	Yes	Yes	X					No public policy/
9	xxxxxxxxxxxx	Yes	Yes	Yes	Yes	Yes	Yes		X			X	Strong public po
10	xxxxxxxxxxxx	Yes	Yes	No	Yes	Yes	Yes	X					No public admini
11	xxxxxxxxxxxx	Yes	Yes	Yes	Yes	Yes	Yes			X		X	Academic/applie
12	xxxxxxxxxxxx	Yes	Yes	Yes	Yes	Yes	Yes			X		X	Public policy/em
13	xxxxxxxxxxxx	Yes	Yes	Yes	Yes	Yes	Yes		X				Economist/narro
14	xxxxxxxxxxxx	Yes	Yes	Yes	Yes	Yes	Yes			X		X	Economics/urba

Phase 2

(Phone/SKYPE Interviews)

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

	A	B	C	D	E	F	G	H	I	J	K	L	
3	Position Title:	Public Policy & Public Administration				Hiring Manager: xxxxxxxxxxxxxx							
4	Posting Number:	10520				History & Political Science xxxxxxxxxxxxxx							
5	Phone Interview Questions											Comments	
6	Note: Phone interview Questions must be approved by Social Equity and the Faculty Search Coordinator. Adapt the matrix to add or delete questions. List every Applicant approved for a Phone Interview.	Background: coursework, teaching, research	Background: Public Admin.	Specifics re: 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			
7	Applicant Name (Last, First)	Rating (1-10?)										TOTAL	
8												0	
9												0	
10												0	
11												0	
12												0	
13												0	
14												0	
15												0	
16												0	
17												0	

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 example (compiled)

	A	B	C	D	E	F	G	H	I	J	K	L
1	Phase 2: Phone Interviews											
2	<i>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.</i>											
3	Position Title: Public Policy & Public Administration					Hiring Manager					XXXXXXXXXXXX	
4	Posting Number: 10520					Department					XXXXXXXXXXXX	
5	Phone Interview Questions										Comments	
6	Note: Phone interview Questions must be approved by Social Equity and the Faculty Search Coordinator. Adapt the matrix to add or delete questions. List every Applicant approved for a Phone Interview.	Background: coursework, teaching, research	Background: Public Admin.	Specifics re: 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	
7	Applicant Name (Last, First)	Rating (1-10?)								TOTAL		
8	XXXXXXXXXXXXXXXXXXXX	9	7.6	8.6	8.4	8.4	8.8	7.8	8.2	66.8	Strong across board/climate	
9										0		
10	XXXXXXXXXXXXXXXXXXXX	8.2	8.4	7.4	7.2	5.8	7.8	5.4	8	58.2	Metropolitization/disaster policy/ strong volunteerism/service	
11										0		
12	XXXXXXXXXXXXXXXXXXXX	7.6	7.4	7.4	7.6	5.4	6.4	6.4	7.2	55.4	Economics/regional and comparative public policy/public	
13										0		



Phase 3 on-campus interviews

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

	A	B	C	D	E	F	G	H	I	J	K	L
1	Phase 3: On-Campus Interviews											
2	<i>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.</i>											
3	Position Title:	Public Policy & Public Administration										
4	Posting Number:	10520										
5		On-Campus Interview Questions										
6	Current	Current research and broadening agenda	Collaborate with other faculty or public sector experts	Include students in research and how	Effectiveness in classroom	Student assignments and assessment	Contributions to department	Heading a policy institute	Department programming/speaker	Questions for Search Committee		
7	Applicant Name (Last, First)	Rating (1-10?)										TOTAL
8												0
9												0
10												0
11												0
12												0

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