A&S Recruitment General Timeline and Admin Guide to Tenured or Tenure-Eligible (TTE) Faculty Recruitment

(Adapt per your dept procedures and timeline, and confirm current W&M policies and procedures)

8/5/2024

Authorization.

- Chair/Dir receives TTE search authorization with approved specialization, salary, and other instructions and deadlines. The authorization will direct hiring units to refer to this document for additional detailed guidance.
- Appoint (at least) a 3-member search committee for full-time each position being recruited.
- The chair/dir and department faculty or search committee may meet to discuss issues related to search, job ad, etc.
- Chair/Dir shares links or guidance with faculty & staff of any referenced resources for faculty recruitment.
- DEI Implicit Bias training will be offered for those who need the required training prior to the review begin date.
- The search authorization is considered the formal charge to the department. The Dean will provide additional best practices to hiring units early in the search process.
- Dept/Prog Admin is Hiring Official (HO). See A&S specific PeopleAdmin (PA) system guidance provided by Human Resources and A&S Faculty Personnel Services.

Narrative Job Ad.

- Hiring unit submits job ad (based on A&S TTE advertising template) and the applicant scoring rubric for approval to Dean's office by the date specified in the search authorization.
- Email your **narrative job ad** and **the unit's proposed applicant scoring rubric** to Kathleen Morgan kpmorg@wm.edu to begin the ad approval process.
- Collaborating as appropriate, your Vice-Dean will relay formal approval of the ad language, and Assoc Dean DEI will relay approval of the scoring rubric.
    - Please note: Diversity statements are no longer required for job applicants. Units are encouraged, however, in providing instructions to candidates to communicate with candidates that they have the opportunity to reflect on their experience or future plans with inclusive teaching practices in other required documents (e.g., a cover letter or teaching statement).

Position Description.

- Refer to A&S Posn Descr Sample TTE Faculty.
- The Hiring Official enters the approved ad language and attributes into the PeopleAdmin position description (PD). Please attach the authorization memo, the approved narrative ad, and an updated departmental organization chart.
- The hiring official proofs the PD and circulates in PeopleAdmin to initiate a sequence of approvals. Level 1 is approval by the Chair/Director.

Posting:

- Using the approved position description (PD), your Hiring Official prepares a draft posting that includes the **Special Application Instructions** from the narrative job ad. Save and keep the posting in HO queue.
- Email the designated HR faculty recruitment PeopleAdmin liaison to collect and activate the posting.
- Check PeopleAdmin a couple days later to confirm the posting is activated.

Advertising and Department of Labor Requirements:

- Other external advertising by the department should reflect relevant searchable key words and point applicants to PeopleAdmin. Positions must be posted in PeopleAdmin before any external advertising goes live.
- Departments are encouraged to post on one of the listed pages within the Diversity and Affinity Professional Organizations Recruitment Resources pdf on Faculty Recruitment & Appointment webpage (under Diversity & Ethics subheading)
- All PeopleAdmin postings are automatically displayed in the online national outlet *Higher Ed Jobs* shortly after the PeopleAdmin posting goes live. This posting satisfies Department of Labor (DOL) requirements.
- **Please note: Hiring units must save the Higher Ed Jobs ad display as a PDF (must include HEJ page header or identifier) and retain with your search records for Reves Center international hires and DOL audit purposes**.

Committee Schedules and Timelines:

- The search committee should project a recruitment timeline in advance that allows a TTE search to be completed approximately mid-Spring semester.

- This includes scheduling multiple search committee and departmental meetings in advance, even if some meetings are later canceled. This helps keep the search process moving forward.

1-2 weeks prior to application review-begin date:

- The A&S Associate Dean for Diversity, Equity, and Inclusion is available to work with HR to assess the make-up of the applicant pool and discuss with you whether additional advertising may be beneficial.

Immediately <u>after</u> application review-begin date:

- HO provide search committee members with guidance and link on how to access PA. All W&M faculty who are added as search committee members can log in to PA via SSO.
- Once logged in, search committee members should modify their view of PA to "search committee." Viewing type can be found via a dropdown in the upper-right hand corner of the PA home screen. Search committee reviews all applicants online in PA. List of applicant names can be downloaded by report from JOBS to excel. Use excel scoring rubric for systematic review of applicants who meet all required qualifications.
- A Box site is one option for consolidating shared search materials, rubrics, and notes.
- Emphasize to all department members the confidentiality of applicant names and information.
- Records Management: Use consistent naming conventions for documents with multiple candidates/searches. Save docs in shared administrative search location for future reference and to ensure proper records retention. Ensure this file location is accessible by more than one individual in the hiring unit. (Currently, Human Resources recommends compiling all recruitment records into one PDF and attaching to the eventual hiring proposal)

Preliminary first-round interviews of "long list" applicants by phone/Zoom.

- Vice-Deans are available for consultation about the long list but **dean approval is not necessary for first-round interviews**.
- HO indicate interview status in PA and may assist set up phone/zoom interview times, appointments with applicants.
- Follow same question list for all interviewees.
- The Search Committee will conduct long-list interviews via zoom or phone. Retain notes in box or the designated recruitment administrative file.

Candidates "not under consideration."

- At this point, the HO should begin dispositioning those applicants who are "not under consideration" by updating reasons for non-selection for applicant who have not moved forward to the long-list.
- Consult with the search committee for appropriate reasons for non-selection from the PeopleAdmin drop-down menu.
- No system messages are sent to applicants until the very end of the close-out process.

Final on-campus interview of "short list" applicant:

- The hiring unit should create a Box site, or use the existing search Box site, and upload the compiled scoring rubric to which the search committee and responsible Vice-Dean have access.
- The Search Committee crafts a proposed short list for the Box folder, which should include the brief rationale for why some candidates are being moved to short-list status while others are not.
    - Email the names of those on the proposed short-list to your Vice-Dean who will review their materials on the Box site. Please expect that short-list approval may take up to 24 hours.
- Search Committee Chair may reach out initially to invite final interviewees.
    - Based on the hiring unit's internal procedures, either the Search Committee Chair or the Hiring Official can work with the candidates to schedule their interview dates and travel arrangements, providing standard information to each applicant.
- Hiring Official updates PeopleAdmin applicant status to indicate on-campus interview applicant status in PA.
- Hiring Official contacts Vice-Dean's Admin Asst to schedule interviewee 30 min appts with Vice-Dean:
    - Hires at the rank of Associate or full Professor must also meet with the Dean A&S.
- The A&S Associate Dean for Diversity, Equity, and Inclusion is available to also meet with candidates during the interview process to have a confidential conversation about DEI-related topics.
- Through Box, provide access to saved application with your Vice-Dean, 1 week in advance of each dean appointment.

- As much as possible, interviews should be similar or equivalent between candidates, including participants, interview questions, and schedules (see optional web resources for planning assistance).
- During on-campus interviews, to address how candidates might participate in and contribute to the W&M community, the following questions should be asked during both the Department/Program and Vice-Dean interviews:
    - Please tell us who is under-represented in your classroom/your discipline.
    - Please describe something concrete you do to ensure those students or colleagues thrive, and ideally, stay in your major/field.

***<u>Optional</u> interview planning resources on A&S web site can be modified for remote or on-site interviews*:**

- *<u>Interview Planning Checklist</u>* may help track arrangements for each candidate.
- Consider sample *<u>Interview Itinerary</u>* for on-campus interview schedule and hosting opportunities. Share final with department and candidate.
- Inform faculty/hosts of Wmbg per diem rates and A/P reimbursement policies. Please limit meal hosts to 1-2 faculty and the candidate.
- NOTE: When preparing a travel reimbursement, use candidate's **full legal name** so A/P creates the Banner ID with accurate data. Include the Banner 93# on the Hiring Proposal and Faculty Appointment Form (FAF).

Hiring unit discussion of finalists and conversation with Vice-Dean:

- Speaking with recommenders for finalists is not required. If a hiring unit feels that a conversation would be helpful, the Chair of the Search Committee and/or Chair or Director of hiring unit should reach out to their Vice-Dean for guidance on best practices. The hiring unit(s) will follow their usual procedures to review and assess the finalists.
- Once the department review & assessment of finalists is complete, the Chair/Director and the Search Committee will prepare summaries of the perceived potential of all finalists to contribute to the department/program, Arts & Sciences, and the university. The finalists should not be ranked.
- These summaries should be based upon the explicit criteria identified in the job posting and should include information regarding experience with and commitment to matters of inclusive teaching.
- The summaries will be shared with the appropriate Vice-Dean, who will then meet with the Chair/Director and the Chair of the Search Committee to determine the path forward, including any salary considerations and who will be sent first offer.

Compiling Search Records and Notes:

- While the hiring unit is discussing the finalists with the Vice-Dean, the Hiring Official shall collect and compile all search records in one location. HR recommends that these records include:
    - Search committee individual member's scoring rubric, as well as a final summary scoring rubric, if used, and committee interview notes, and any departmental feedback or evaluation records.
    - HR recommends these documents be combined into a single PDF file, with file name to include the hiring unit name and the position number searched, and <u>upload</u> this PDF to the Hiring Proposal. This permits search records to be associated with the position and available to HR in the event of an audit.
- Minutes/notes from dept meeting can be used as <u>brief</u> (several sentences) hiring justification on Hiring Proposal for selected candidate. Longer hiring justification can be an attachment uploaded to HP.

Hiring Proposal:

- Based on the chair's discussion of finalists with the Vice-Dean, the hiring official works with the chair/dir to prepare a hiring proposal for finalist and wait for its approval in PA to extend the verbal offer.
- Hiring Official reviews the resource: *Hiring Proposal Job Aid* which includes appropriate codes and information to include in the HP.
- The hiring proposal should include a whole number salary figure that is below the maximum salary range, for the initial salary offer as discussed with the Chair and Vice-Dean. Proof the HP carefully for correct attributes, which feed into Banner.
- Circulate HP for approvals.
    - Level 1 will receive system email notification that hiring proposal approved to make verbal offer – and must read the hiring proposal system history comments for further instructions.
    - Hiring Proposal history instructions include information on tenure and startup for TTE hires, relocation for hires outside the local region, and next steps regarding the Faculty Appointment Form.

- The Department Chair, in close collaboration with the Vice Dean, will negotiate the offer with the finalist.
- If the finalist negotiates from a lower salary to an increased salary, but still within allocated range, Hiring Official will update HP as a Counteroffer action and recirculate for approvals (see Hiring Proposal Cycle job aid).
    - A counteroffer that is circulated *still within the allocated salary range* allows chair to continue discussion with the candidate. If the candidate verbally accepts at that point, this can include preparation of the Faculty Appt Form.
    - If candidate requests a salary *above range*, Vice-Dean must be contacted and the HP cannot move forward until salary fully approved or resolved.
    - Salaries above range are only applicable for the specific candidate under discussion. A copy of the approval email must be attached to the revised HP.
- *IMPORTANT: If you hope for a written offer to be issued before any university break/holiday, please be aware of advance timing needed for decision-making, hiring proposal, negotiations, startup estimate approval, FAF preparation, offer letter preparation, etc.*

If Verbal Offer Declined:
- If the verbal offer is declined, Level 1 returns HP to Hiring Official to indicate declined offer. Inform Vice Dean and discuss next available candidate, if any. If next candidate is approved by Vice Dean, begin next Hiring Proposal.

When Verbal Offer Accepted - Faculty Appointment Form (FAF):
- When candidate verbally agrees to terms (salary, startup estimate submitted, date of interim/tenure review, relocation if applicable per policy) access from recruitment web page the **Full-time Faculty Appointment Form (FAF)** and submit through the web page DocuSign link. Form will automatically route to Dean's office, who will prepare the letter of intent.
- Any existing 93# must be included on the Faculty Appointment Form submitted to Dean's Office.
- Hiring unit does NOT yet take any action in PeopleAdmin, wait until the signed letter is received before finalizing PeopleAdmin actions.

Letter of Intent (LOI):
- Written offers for TTE faculty are called Letters of Intent (LOI) and issued via DocuSign. LOI are normally prepared and sent within 48 hours of receiving the FAF, provided all information is accurate.
- You will know the LOI has been issued when you are copied on the email "New Hire Instructions." LOI have a 1-week turnaround for response.
- Everyone copied on the New Hire Instructions email will receive a copy of the signed LOI for your dept personnel records, and if applicable, to document a relocation stipend.

Receiving copy of signed LOI:
- When SIGNED LOI is received via Docusign, Celebrate!
- Level 1 takes action to move PeopleAdmin hiring proposal to "*Offer Accepted, Notify Employment*."
- The "offer accepted" action alerts HR to initiate the next step of the background check.
- The Dean's Office provides the signed LOI to HR to include on the hiring proposal.

Closing out the search:
- After Level-1 moves HP to "*Offer accepted – notify employment,*" Hiring Official can take remaining steps to close the search.
- HO finishes dispositioning remaining applicants who are "not under consideration" by updating reasons for non-selection. No system messages are sent to applicants until the very end of the close-out process.
- Consult with the search committee for appropriate reasons for non-selection from the PeopleAdmin drop-down menu.
- Reasons for non-selection will also be selected for long-list and short list applicants who were not selected. There is an option to "not send email" for long- or short-list candidates, since it is expected that these candidates have been, or will be, personally notified by the search committee.
    - Dept Chair or Search Committee Chair should personally contact interviewees who were not selected.
- When every non-selected applicant has been dispositioned (and contacted if relevant), email HR PeopleAdmin liaison to let them know that the search is ready to be fully closed.

    - In this email, et HR know if the search was filled or unfilled, and whether the unfilled search was due to no viable candidates, all offers declined, or another reason. (this is not always obvious to HR)
- After HR closes the search, PA will send automated notice to non-interviewed candidates that search is closed.

Records Management:
- Save signed offer letter, c.v. and hiring proposal for new employee's permanent dept personnel file/e-file.
- Records Management: See the Hiring Proposal stage for HR's recommendation about search records compilation and upload to hiring proposal. Paper or electronic search files and notes must be retained confidentially per state retention guidelines. Note the year that recruitment records can be destroyed after Records Management approval.
- Depending on your unit's tracking procedures and in consultation with Chair/Dir:
    - Add new employee's interim and tenure review dates to any shared dept tracking lists.
    - Add employee to projected Scheduled Semester Research Leave (SSRL) shared dept master schedule.

Onboarding your new hire:
- See *New Hire Instructions* email to employee (Chair and Hiring Official are copied) and liaise with HR for new employee I-9 verification on or before their start date.
- Liaise w Reves Center for International Studies if your new hire is not a permanent US resident.
- Assist faculty on-boarding steps, including processing relocation stipend if applicable.
- Admin talk with chair/dir about office space, phone, computer, directory, web page updates, etc.

Finances Related to TTE Searches
- If recruitment expenses have been budgeted and authorized by the dean, these expenditures should be allocated to the department's dean support index up to the authorized amount.
- For authorized relocation stipend documented in the offer letter, the department must verify the move to a new, local address and then an URSA must be completed for Dean's Office signature. Follow instructions from the A&S Dean's Office Fiscal Team.