Search Process Example

The search process consists of a number of steps, some of which require documentation to be reviewed and approved by various campus officers before proceeding to the next phase. These forms serve a variety of purposes, from compliance with state civil service regulations, compliance with campus fiscal policy, and helping to ensure compliance with the campus affirmative action plan.

The flowchart below outlines the various steps in an Academic Professional Search workflow. We’ll be going through these steps briefly in the next few pages.

Figure 1 – Search Process Flowchart
Hiring Request Forms are not always required. Refer to AHR website and your unit's HR office.

Legend:
- Form (Search, Summary, etc)
- Review and Approval
- Search Related Process/Procedure
- Related Procedures

Color Codes:
- Departmental Process
- OEOA Process
- SHR/AHR Process
- College/Unit Process

Search Process Flowchart

1. Hiring Request Form
   - Avg Time Submit to Approval: 1 to 5 Days
   - Department
   - School (if applicable)
   - Dean/MAU
   - Chancellor (if applicable)
   - Academic Human Resources
   - Provost

2. PAPE (AP Only)
   - Avg Time Submit to Approval: 3 Days
   - College/Unit
   - AHR PAPE Reviewer
   - PAPE Final Approver

3. Academic or Faculty Search Form
   - Avg Time Submit to Approval: 2 Days
   - EEO/College Approval
   - Ofc of Diversity Approval

4. Posting Period (2 to 4 weeks)
   - Goal Email Notification
   - Search Committee Initial Meetings
   - Recruitment Plan Assistance
   - Develop Evaluation Criteria
   - Review OEOA guidelines and procedures
   - Schedule interviews

5. Screening/Phone Interviews (if applicable)
   - Review applicant pool and Diversity of the Pool Report

6. Selection of Finalists, update applicant status codes in HireTouch
   - Finalist Notification Form
   - Avg Time Submit to Approval: 1 Days
   - Ofc of Diversity Approval
   - Candidate Interviews and Reference Checks
   - Department Approval
   - EEO/College Approval

7. Summary Form
   - Avg Time Submit to Approval: 1 Day
   - Ofc of Diversity Approval
   - Department Approval
   - EEO/College Approval

8. Offer Letter to Proposed Appointee
   - Receipt of Acceptance Letter, upload to HireTouch

9. Enter hire information into HRFE
   - Search Contact
   - Ofc of Diversity Approval
Complete Hiring Request Form (HRF)

Please note: Before completing the Hiring Request Form, confirm that the form is necessary for the position in question. These forms are not always required. Consult Academic Human Resources and your College/Unit HR office for guidance.

The first step in the academic search workflow is the hiring request form (when required). Instructions for completing this form can be found at the following address: http://www.ahr.illinois.edu/forms/HRF_instructions.pdf

The hiring request form documents the necessity to fill a position and that funds are available for the position.

![Hiring Request Form Example](image)

Figure 2 – Hiring Request Form Example
Complete PAPE/Job Description

At the same time that the hiring request form is being routed for approvals, the PAPE form (Academic Professional searches only) can be completed and routed for approvals. If currently vacant position is being filled (as opposed to a newly created position), you may be able to use an existing PAPE, as long as the duties of the position have not changed and the PAPE was approved or updated within the past three years.

You’ll need the following information about the position to complete the PAPE:

- Organizational Chart (includes who the position reports up to and if the position supervises anyone)
- Primary Position Function/Summary
- Detailed Duties/Responsibilities
- Position Requirements and Qualifications: Education/Experience/Training/Knowledge Requirements

See Figure 3
The PAPE is a detailed job description used to exempt the position from the State University Civil Service System.

- Organizational Chart (includes who the position reports up to and if the position supervises anyone)

- Primary Position Function/Summary

- Detailed Duties/Responsibilities

- Position Requirements and Qualifications: Education/Experience/Training/Knowledge Requirements (be sure to indicate what is required vs. preferred)

*The HRF and PAPE must be fully approved before the Search Form can be routed for approvals*

Figure 3 – PAPE and Job Description Questions
Sample Answers to PAPE and Job Description Questions:

| Organizational Chart | Chancellor  
|                      | Associate Chancellor  
|                      | Director  
|                      | Assistant Director  
|                      | AP Staff Members  
|                      | Civil Service Staff Members  
| Primary Position Function/Summary | Supervise office operations and act as liaison to other campus units  
| Detailed Duties/Responsibilities | Responsible for creating and maintaining the office budget, supervising other academic employees and civil service employees, creating annual reports on the office operations, serve as a guide for the staff in achieving the office mission, delegate the day-to-day tasks of the office to other staff members  
| Position Requirements and Qualifications: Education/Experience/Training /Knowledge Requirements | Bachelor's degree required, masters preferred. Specialization in business administration, accounting, human resources, or education administration preferred, managerial experience, excellent oral and written communications skills, experience with supervision, event planning, and office technology required  

A guide to completing the PAPE can be found here:


Complete Search Form

The next step in the search process is completing the search form. There are several decisions that will need to be made prior to completing the search form, including (but not limited to):

- **Selecting a search committee and search committee chair.** Whenever possible, the search committee should be diverse in race/ethnicity and gender. Also, since the search committee is an advisory body to the hiring authority, the search chair should not be the individual who is serving as the ultimate hiring authority for the position.
- **Creating a job announcement.** This announcement will serve as the content of advertisements for the position vacancy. It should contain the following information:
o Location of position
o Rank (if applicable) and Title of position
o Brief statement of duties
o Minimum qualifications for the position. These should not be too restrictive, as the selection of finalists is bound by these qualifications, and individuals not meeting these stated qualifications are not eligible for further consideration.
o Preferred qualifications. Any qualifications that are desired but may not be absolutely necessary for a candidate to possess can be listed as a preferred qualification.
o Salary statement, either a specific range or a statement indicating that the salary is commensurate with experience and/or qualifications
o Appointment status (visiting vs regular appointments, 12 month, 9 month, etc)

• Selecting a closing date for the search. This should allow for enough time for interested applicants to find out about the position as well as complete their applications. If the applicant pool is deemed insufficient as the closing date draws near, the search may be extended. If you wish to keep the possibility of accepting late applications open, you may wish to have a full consideration date instead. In this case, the “closing date” field should be left blank on the search form.
• Selecting recruitment sources. Required recruitment sources are listed on the search form. Additional sources should be utilized to reach a wide, diverse applicant pool. The Office of Diversity, Equity, and Access is at your disposal for recruitment source suggestions and recommendations.

Instructions for completing the search form can be found here:

Assistant Director
Administration
University of Illinois at Urbana-Champaign

The Assistant Director will lead in the development of the budget for the office, supervise other academic and civil service employees, provide leadership and guidance in meeting the goals of the office, create annual reports on office budget and operations, delegate daily tasks to other staff members, and serve as a liaison to other units on campus that work with the office.

Minimum Qualifications
Bachelor’s degree required. Managerial experience, event planning experience, supervisory experience, and experience with office technology is required.

Preferred Qualifications
Master’s degree preferred. A bachelor’s or master’s degree with a specialization in business administration, accounting, human resources, or education administration is preferred.

Salary: Salary is commensurate with experience and qualifications.

Proposed Start Date: As soon as possible after the closing date.

Application Procedures and Deadline: To apply for this position, please create your candidate profile at http://jobs.illinois.edu and upload your cover letter and resume by the November 16, 2011 close date. On-line application will require name and contact information for 3 references. For further information regarding application procedures, please contact Heidi Johnson at oeoa@illinois.edu or 333-0885.

Illinois is an Affirmative Action/Equal Opportunity Employer and welcomes individuals with diverse backgrounds, experiences, and ideas who embrace and value diversity and inclusivity. (www.inclusiveillinois.illinois.edu).

Figure 4 – Position Announcement Example
Conduct First Search Committee meeting

Several items may be addressed during the first committee meeting. This meeting should take place as soon as possible after the search has been posted. Items that may be addressed include:

- Committee charge given by the hiring official or search committee chair
- Introduction of Affirmative Action officer and role and/or EEO officer and role
- Review of search committee training materials (this may be completed by committee members individually prior to the first meeting as well)
- Discuss expectations of applicant confidentiality – information regarding applicants should only be shared on a need-to-know basis
- Discussion or scheduling of interviews. By setting aside timeslots for interviews well in advance of the selection of finalists, delays and scheduling conflicts during the interview phase can be mitigated. Since finding time to interview candidates is often one of the greatest challenges for a committee, we suggest starting this process well in advance of the finalist selection.

- **Develop Evaluation Criteria**
  - The criteria and procedures that will be used to screen applicants should be developed early in the search process. This may be done in a variety of ways, though all processes must be founded on the qualifications stated in the position announcement.
  - Matrices or rating sheets may be employed. See figure 5.
Appendix B-1
SAMPLE ADMINISTRATIVE CANDIDATE RATING FORM

________________________ (AP Title)

Candidate: ________________________ Review Date __________

<table>
<thead>
<tr>
<th>Credentials, Skills, and Abilities</th>
<th>Yes</th>
<th>No</th>
<th>Not clear</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bachelor’s Degree</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Managerial Experience</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Event Planning Experience</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Supervisory Experience</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Office Tech Experience</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Desired</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Master’s Degree</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Desired Specialization</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

After reviewing the application letter, resume and recommendations (if applicable), please rate the following criteria on a scale of 1 to 5, with 5 being the highest:

1. References

2. Preparation Provided by Prior Work Experience

3. Knowledge of or Ability to Adapt to Department Needs

4. Other Comments:

Total Candidate Score

Should we interview this candidate? ____yes ____no ____unsure

Reviewer ________________________ Date __________

1 List skills and abilities required for successful performance of the job. Included on this table are a mix of general skills and more specific skills to aid in generating ideas for the types of skills that should be listed for assessment, dependent on the position.

Figure 5 – AP Rating Sheet Example

It is important to keep accurate notes regarding the screening procedures employed, as this information will be needed when completing the Finalist Notification Form later in the search process.
Review the Diversity of Pool Report

After the search has closed, the Diversity of the Pool Report should be reviewed. If the pool is insufficient, the search may be extended. Please consult your AA officer, EEO officer, or OFFICE OF DIVERSITY, EQUITY, AND ACCESS for assistance. See Figure 6 for an example of this report.

Figure 6 – Diversity of the Pool Report

Evaluate Candidates

Candidates should be screened using the evaluation criteria previously developed. Depending on the size and qualifications of the applicant pool, you may wish to divide the pool into additional tiers, or select a larger group of candidates to be interviewed by phone before selecting a smaller subset of candidates as finalists for on-campus interviews. If you choose to
utilize phone/screening interviews before the final interview stage, you’ll need to include this in your evaluation criteria.

At this point it may also be appropriate to develop interview questions and agendas for the finalists’ on-campus visits, if this has not already been done.

**Create Interview Itinerary**

Working with the previously-scheduled interview timeslots, it is helpful to develop a standard interview itinerary for the candidates to ensure equitable treatment of each finalist as well as to help maintain a structured interview process. Below is an example of a basic itinerary:

- 9:00 – 10:00 AM Committee meets with candidate
- 10:00 – 11:00 AM Direct report meets with candidate
- 11:00 – 11:30 AM Break
- 11:30 – 12:30 PM Lunch with office personnel
- 12:30 – 1:30 PM Candidate presentation to committee, staff, and other stakeholders

**Develop Interview Questions and Reference Check Criteria**

A standard set of interview questions should be used by the search committee and hiring official. It is important to develop a standard set of questions to help avoid asking questions that are not related to the position requirement or are otherwise off-topic. This helps ensure the interview is fair and concise.

Additionally, having a standard set of questions for your reference checks helps ensure that relevant information is collected from all references and helps ensure a fair and consistent search process.

Below is an example of a basic set of interview questions:

1. Tell the search committee about your experience in [area relevant to position]
2. What do you find interesting about the position and in what ways do you believe you can contribute to our office?
3. Please discuss a project that you oversaw or managed from conception to implementation and in your response, please describe your organizational style and how you prioritize tasks with competing deadlines.
4. If we called your strongest advocates/supporters and those who were not as supportive of you, what would we hear?
5. What are your greatest strengths that you bring to this position and what are the challenges that the position would present to you?
6. What are you looking for in terms of career development?
7. What kind of goals would you have in mind if you got this job?
8. If selected for this position, can you describe your strategy for the first 90 days?
9. Are there any questions you have for us?
**Complete Finalist Notification Form**

The Finalist Notification Form notifies the Office of Diversity that the finalist have been selected and serves as a checklist for ensuring that required documentation has been attached to the workflow.

You’ll need to have the following items/information to complete this form:

- Copies of all advertisements. These are uploaded under the “Activity” tab
- A summary of the evaluation procedures used to select the finalists. This can be uploaded under the “Activity” tab
- A copy of the phone and finalist interview questions (if available). If the finalist interview questions have not been written yet, you can note that on the form and attach them to the workflow at a later time.

Instructions for completing the Finalist Notification Form can be found in the document linked here:


We suggest completing the Finalist Notification Form while interviewees are being invited to campus and the interviews are being scheduled. Securing time slots for interviews ahead of time (as suggested earlier) can help expedite this process.

After the Finalist Notification Form is completed, the summary form will become available.

**Conduct On-Campus Interviews and Check References**

Reference letters can be requested from listed references using the HireTouch system. If the committee wishes to contact references directly, a standard list of specific, job-related questions should be developed. All references should be asked the same set of questions.

Using the previously-developed interview questions and agenda, the finalists should be interviewed. It is important to maintain notes either as a committee or by the chair of the search regarding the evaluation of the finalists. This information will be needed to complete the Summary form.

Please note: If difficulties arise from candidates withdrawing from consideration, or if the pool of finalists proves inadequate, please contact the Office of Diversity as soon as possible to discuss further options. You may elect to extend the search at this time, or move on to a second tier of finalists, which may require additional finalist documentation. The Office of Diversity is again at your service to help advise you on your next steps as well as to assist with expediting the process.
Complete Summary Form for Proposed Academic Appointment

After the proposed appointee has been identified, you will want to begin working on the summary form. You will need demographic information for the proposed appointee, as well as information regarding the evaluation of the other finalists who are not being offered a position at this time.

The information you will need to complete the summary form is listed below. Please note: the summary form will need to be completed and approved at least up to the EEO Officer/College level before a written or verbal offer may be made the proposed appointee.

- Proposed Appointee name and demographics
- Proposed starting date (can be an estimate)
- Proposed salary (can be an estimate. If this offer is outside of the range approved on the Hiring Request form by more than 10 percent, approval will be required from the office of the Provost before proceeding)
- A brief justification for the hire. This should be an explanation of why the candidate is the most qualified based on the appointee’s skills, interview performance, reference checks, etc.
- An explanation of the interview process for each finalist not selected as well as an explanation as to why each finalists is not the best qualified, based on interview performance, reference checks, etc.
- The race/ethnicity and gender of each finalist who was interviewed on campus

Please see Figure 7 for an example of summary justifications.

Candidate #1. Candidate #1 is external to the university but has many experiences with managing professional staff, mentoring and coaching new and existing personnel, providing project management vision to their employer, and leading many high profile projects to successful completion. Candidate #2 has been promoted several times during their career to positions with increasing responsibility and has reported to and worked directly with varying level of stakeholders. Candidate #2 has worked with companies that had no procedures and helped create them, to companies that have very structured project procedures and has helped improve them. Although everyone acknowledged that Candidate #2 would require some short-term mentoring to become familiar with department and the University, there was strong confidence in their management, management, and leadership skills.

Candidate #2. Candidate #2 has been employed by the University for over twenty years in a number of different jobs. This knowledge of the university, working with a number of university personnel throughout candidate #2’s career and being a current employee made candidate #2 a good candidate for this position. Candidate #2 impressed the search committee and others staff who participated in the interview process. Concerns that where highlighted during the second round of interviews included: 1) limited experience managing staff, 2) limited (or inconsistent) success leading existing projects (delayed deliveries and missed deadlines), 3) difficulty leading groups and cultivating productive communications. The leadership and management responsibilities of this position were thought to be stretch based on candidate #2’s current performance.

Figure 7 – Summary Example
Offer Letter and Closing the Search

After the summary form has been approved by the EEO Officer/College, the form will be routed to the Office of Diversity, Equity, and Access for review. At this time, an offer letter may be issued to the proposed appointee.

Please note: The date of the offer letter (if drafted in advance) must match the date it is issued. Also, please remember that appointments cannot be made retroactively, so the proposed starting date should be far enough in the future to allow for the completion of the search process. If you have any concerns about this, please contact OFFICE OF DIVERSITY, EQUITY, AND ACCESS and we will work with you.

After the Office of Diversity, Equity, and Access has reviewed the summary form, we will route it back to the Search Contact. This person should be someone who will have access to the signed acceptance of the proposed appointee. The Office of Diversity, Equity, and Access will also send an email to that individual indicating any other information or steps that will need to be completed before the search is finalized.

Once the search contact has uploaded the acceptance letter and changed the appointee’s applicant status code to “Hired”, that person will approve the summary form, routing it back to the Office of Diversity, Equity, and Access for final approval. The Office of Diversity, Equity, and Access will then double-check to make sure all required information is present, that the offer acceptance is uploaded, and sign off on the summary form one more time.

At this point, an email will be sent indicating that the appointment of the proposed hire is approved, along with instructions to attach that email to the transaction in HR Front End. The appointment date for the candidate must be after this date. At this point, the search is officially concluded.