

MONTANA TECH

SEARCH CHECKLIST

- DEVELOP PRA AND OBTAIN APPROVALS FROM YOUR DEPARTMENT HEAD/DIRECTOR AND DEAN**
 - a. It is recommended that an electronic version be sent to me for feedback, then
 - b. Once finalized, print it and have the Department Head and Dean sign it – be sure to use the most recent PRA on the Website, or it will be returned.
 - c. Scan in and Send the signed PRA and the word document PRA to Vanessa Van Dyk, HR Director/EEO/AA Officer
 - d. Signatures then will be obtained from: the Academic VC/Provost, the Chancellor and then the Vice Chancellor of Administration and Finance. (in that order)

 - ESTABLISH SEARCH COMMITTEE AND NOTIFY PERSONNEL OF COMMITTEE MEMBERS**
 - It is best to establish your search committee when you are getting ready to post the job. Do not wait until the job is about to close or has closed.

 - SCHEDULE EEO MEETING (all committee members must be present)**
 - You should the training for your committee as soon as possible. Do not wait until the job is about to close or has closed.

 - SET UP MATRIX ACCORDING TO THE PRA**
 - List required qualifications
 - Required skills
 - Preferred Qualifications
 - Preferred skills

 - SCREEN APPLICANTS** - Those that don't meet minimum qualifications will be identified for you, and should be included on the matrix. You can choose to take the computer's word for it and not review those, or you can choose to review all the applicants placed in that bucket. Keep in mind that if you choose to review one candidate that the computer identified as "does meet minimum qualifications" you must do it for all.

 - COME TO A CONSENSUS AND RANK CANDIDATES ACCORDING TO TIER**
 - Top Tier
 - Middle Tier
 - Bottom Tier
 - Doesn't meet minimum Qualifications

 - MAKE A DECISION ON WHAT YOUR NEXT STEP WILL BE**

It can be phone screens, where you call and provide the candidates with the salary range, find out if they are still interested and then get permission to check references

OR

You can choose to do phone, zoom or in person interviews next.

 - MAKE AN APPOINTMENT WITH THE EEO/AA OFFICER FOR MATRIX REVIEW AND APPROVAL**
 - Once approval is obtained you can move to the next step (which is usually) calling references. It could also be a 1st round of phone interviews to narrow down the candidate list or other options on a case by case basis. Please discuss next step with EEO Officer.
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- Depending what your next step is you may need to provide additional information, such as completing form II-Reference Checks/Interview approval form.

ONCE THE MATRIX IS APPROVED, YOU NEED TO GET APPROVAL FOR YOUR NEXT STEP. ONCE BOTH ARE APPROVED YOU CAN PROCEED TO YOUR NEXT STEP WHICH COULD BE:.

- Do phone screens (as mentioned above) for all of the top tier candidates
- Call references of all the top tier candidates
- Call references of all of the top and middle tier candidates
- Set up Zoom Interviews for all of the top tier candidates
- Set up in person interviews for all the top tier candidates

DETERMINE WHO YOU WANT TO MOVE FORWARD IN THE PROCESS AND GET APPROVAL TO DO SO.

- **GET APPROVAL TO DO PHONE SCREENS**
 - Complete form II and include anyone that withdrew from consideration
- **GET APPROVAL TO CHECK REFERENCES**
 - Complete form II and include anyone that withdrew from consideration
- **GET APPROVAL TO DO ZOOM INTERVIEWS**
 - Complete form II and include detailed information regarding any candidate that is not proceeding to the next step and include any candidates that withdrew themselves from consideration
- **GET APPROVAL TO DO IN PERSON INTERVIEWS**
 - Complete form II and include detailed information regarding any candidate that is not proceeding to the next step and include any candidates that withdrew themselves from consideration

CONDUCT LAST STEP IN THE PROCESS WITH THE FINALISTS

COMPLETE FORM III – FINALIST SELECTION

- State who the committee wants to hire as their first choice and why.
- If Applicable, you can state your second choice and why, if your first choice does not accept the offer.
- You must also provide a detailed reason why the other candidates were not chosen. The reason must be related to the job description and qualifications listed for the job.

BEFORE THE OFFER IS APPROVED BY THE EEO/AA OFFICER – OTHER APPROVALS MUST BE OBTAINED DEPENDING ON THE POSITION: (This can be done by email/verbally or by phone)

- **FACULTY POSITIONS OR DIRECTOR / HIGH LEVEL PROFESSIONAL POSITIONS** – Must be approved by the Dept. Head, Dean, Provost and Chancellor
- **CLASSIFIED STAFF** – Must be approved by the Dept. Head or Director
- **MBMG** – Must be approved by John Metesh and Chancellor

MAKE VERBAL OFFER- usually done by chair but it can be done by Dept Head

COMPLETE A PERSONNEL ACTION FORM (PAF) AND SEND TO THE EEO/AA OFFICER/HR DIRECTOR.

- **Make sure to include:**
 - **Relocation – if offered**
 - **Time toward tenure of promotion**
 - **Research Start up packages**
 - **Start Date**
 - **Salary**
 - **Title**

OFFER LETTER AND/OR CONTRACT GETS DRAFTED AND SENT OUT – HR DIRECTOR WILL MAKE THE REQUESTS SO ALL PAFS NEED TO COME TO THE HR DIRECTOR.

- Professional Offer Letters are handled by HR Director.
- Faculty Offer Letters are handled by Colleen Fink –
 - Does not include visiting instructors/faculty
- Letters of appointment for any title including visiting faculty are handled by HR Director
- Classified Offer Letters are handled by Cathy Isakson

HR WILL CLOSE OUT THE POSTING WHICH INCLUDES EMAILING REMAINING REJECTION LETTERS TO CANDIDATES

SEND THE FOLLOWING DOCUMENTS TO HR/CATHY ISAKSON FOR THE SEARCH FILE

- **CONSENSUS MATRIX**
- **REFERENCE CHECKS – QUESTIONS AND ANSWERS**
- **INTERVIEW QUESTIONS/NOTES – QUESTIONS AND ANSWERS**
- **FORMS II – REFERENCE CHECKS & INTERVIEW APPROVAL FOR EACH STAGE IN PROCESS**
 - i.e. Form II for approval to do Reference
 - Form II for approval to do Zoom Interviews
 - Form II for approval for an in person offer
- **FORM III- FINAL SELECTION**

• **CANDIDATE MUST REPORT TO HR ON FIRST DAY AND THEY MUST HAVE THEIR ORIGINAL DOCUMENTS THAT PROVE THEIR ELIGIBILITY TO WORK IN THE US. COPIES ARE NOT ACCEPTABLE.**