California State University, East Bay  
Office of Academic Affairs  

Tenure-Track Search Process Guidelines  
2017-2018  

Stage One:  Elect The Committee  

- Elect a Search Committee of Tenured/Tenure-track Faculty,  
  Spring Quarter (CBA 12.22.a. "Each department or equivalent unit shall  
  elect a peer review committee of tenured employees for the purpose of  
  reviewing and recommending individuals for probationary appointments.  
  At the discretion of the President and upon request of the department these  
  peer review committees may also include probationary employees.")  

- Select one person on the Committee to be the Diversity Advocate, and  
  add this person’s name in the “Internal Notes, General Notes” section  
  in Interfolio.  https://account.interfolio.com/sso  

- Submit Committee names to the College Dean’s and Provost’s Offices  

- Dept. Chair convene committee and schedule future meetings  

Stage Two:  Attend the Required Orientation and Meeting  

- Tenure-Track Search Committee Orientation - Hosted by the Office  
  of Academic Affairs (OAA)  

- Diversity Advocates for each Search – schedule a meeting with the  
  DELO (Diversity & Equity Liaison Officer) and UDO (University  
  Diversity Officer). Prior to the meeting, email a preliminary/draft  
  position announcement to the DELO and UDO.  
  
  **DELO – Dr. Carlos Salomon (carlos.salomon@csueastbay.edu)**  
  **UDO – Dr. Dianne Woods (dianne.woods@csueastbay.edu)**  

Stage Three:  Develop the Position Announcement and Faculty Recruitment Plan –  
Position Announcement Template should be loaded in Interfolio, edit to conform  
to Department requirements, as necessary.  

See also: http://www.csueastbay.edu/oaa/files/docs/policy-files/patemplate.doc  

- Position Announcement – Prepare a position announcement using the  
current template for FULL-TIME TENURE-TRACK positions (See  
link, above)  
  
  - Carefully choose the required qualifications and criteria for  
    selection:
Flexible vs. rigid requirements advisable (preferred vs. required, should vs. must). The requirements listed as “must have” will be applied to every applicant.

Prioritize selection criteria (assign relative value) and enter them into Interfolio under “Evaluation Settings, Criteria.” Make sure the priorities are apparent in the position description.

Note: Broad rather than highly specialized announcements usually attract more diverse candidates.

- Requiring a Diversity Statement is highly recommended. See: http://www.csueastbay.edu/about/diversity/files/docs/pdfs/operational-def-diversity-equity-inclusion.pdf

- Prepare a Faculty Recruitment Plan (FRP) - which includes a recruitment timeline, the application screening criteria, etc.

- Meet with the DELO and UDO, if needed.

- Review Faculty & Student Composition Data (accessible from Institutional Research)
  http://www.csueastbay.edu/ir/files/html/University.Employees.8-2.html
  and http://www.csueastbay.edu/ir/students/first-time-students.html

- Complete the Faculty Recruitment Plan (FRP) and upload it into Interfolio for the position announcement under “Internal Notes” as an attachment. Please title the document appropriately, as other documents will be uploaded in this section throughout the process.

Stage Four: Submit the Position Announcement for the Required Approvals
Approval is signified by the changing of the position’s status throughout the process to the next level of review and approval. It is also important that you email the next level to let them know the position requires their review and approval.

Please refer to the “Interfolio List of Statuses for a Tenure Track Faculty Search.”

- The first status for the position is: “Generate Position Announcement Template and Submit the Faculty Recruitment Plan & Screening Criteria [Dept. or College Admin].”

- Once the position announcement and FRP are ready for review and approval, change the position status in Interfolio to: Chair Review of Position, FRP, and Criteria [Dept. Chair]
- This position status signifies the position announcement and FRP are awaiting review and approval by the Department Chair.

- Email the Department Chair and (cc the Admin) to let them know the position announcement and FRP are ready for their review and approval.

- Approval is signified by the changing of the position’s status to the next level of review and approval.

**Department Chair – to approve the position announcement and FRP after review, change the position status to:**

  - Dean Review of Position, FRP, and Criteria [College Dean]
    - This position status signifies the position announcement is awaiting review and approval by the Dean.
    - Email the Dean (cc the Admin) to let them know the position announcement is ready for their review and approval.
    - Approval is signified by the changing of the position’s status.

**College Dean – to approve the position announcement and FRP after review, change the position status to:**

  - DELO and UDO Review of Position, FRP, and Criteria [DELO and UDO]
    - This position status signifies the position announcement is awaiting review and approval by the DELO and UDO.
    - Email both the DELO and UDO (cc the Admin) to let them know the position announcement is ready for their review and approval.
    - Approval is signified by the changing of the position’s status.

**DELO and UDO – reviews the position announcement and FRP, suggest changes if needed, and after approval, submit to the Provost’s office for review and approval.** The DELO and UDO should review and approve or request discussion/correction within 72 business hours after the Dean’s approval.

  - If there are any issues that need to be addressed, the DELO and UDO will contact the search committee, Dept. Chair, and/or College Dean to discuss and resolve.
• If approved, the position status will be changed to: **Provost's Office Approval Position, FRP, and Criteria [Gina or Linda]**

  - **Provost’s Office** – after review and approval by the Provost’s office, the OAA position number and PeopleSoft (PS) number will be assigned and the position announcement will be published in Interfolio for applicants to submit applications. The search committee, department chair, and dean will receive an email notification that the position has been approved and published.

  - The position status show: “**Position Open for Accepting Applications**”

**Stage Five: Screening Applications in Interfolio**

  - Change the position status to: **Screening 1 - Committee Members Review and Rank all Applications [Search Committee]**
  - Interfolio automatically sends acknowledgements to all applicants recognizing receipt of their completed application
  - Decide whether the screening/review and rating of applications by Search Committee members will be by “**Blind Review**” (evaluators cannot see each other’s scores/rankings) – select appropriate setting in Interfolio
  - Review each application using approved screening criteria, loaded in Interfolio, assigning the appropriate rating per criteria

  - **Required:** the following information from the rating/scoring process must be available, either within Interfolio (using the stars and criteria) or as a separate attachment, titled appropriately and uploaded into Interfolio under “**Internal Notes:**”
    - Criteria applied to each applicant
    - Scoring by criteria for each applicant
    - Scoring by each evaluator
    - A summary or total of all scoring per applicant
    - Any comments about the applicants by the search committee members

  - Use the “comments,” “notes,” or “tags” in applicant files in Interfolio as needed
Stage Six: Obtain Approval to Conduct Telephone Interviews

Approval is signified by the changing of the position’s status.

- Designate the applicants selected for telephone interviews by changing an Applicant’s status to “Telephone Interview” in Interfolio under a particular applicant’s name/file.
  - Change Position Status to: Screening 2 - Committee Members
    Devise Telephone Interview Questions and Recommend 3-10 for Telephone Interviews [Committee Chair]
  - After all applicants selected for telephone interviews have been designated, change the position status to: Screening 3 - Chair Review for Telephone Interviews [Dept. Chair]. This position status signifies the list of selectees for telephone interviews is awaiting review and approval by the Department Chair.
  - Email the Department Chair and (cc the Admin) to let them know the proposed list of telephone interviewees is ready for their review and approval.

- Department Chair – after reviewing the screening/ranking the proposed applicants designated for telephone interviews, to approve the list of applicants selected for telephone interviews:
  - Change the position status to: Screening 4 - Dean Review for Telephone Interviews [College Dean]
  - This position status signifies the proposed list of applicants selected for telephone interviews is awaiting review and approval by the Dean.
  - Email the Dean (cc the Admin) to let them know the proposed list of applicants selected for telephone interviews is ready for their review and approval.
  - For a dissenting opinion, please submit an email to Gina Traversa (gina.traversa@csueastbay.edu)

- College Dean – after reviewing the screening/ranking the proposed applicants designated for telephone interviews, to approve the list of applicants selected for telephone interviews:
  - Change the position status to: Screening 5 - UDO and DELO Review for Telephone Interviews [UDO and DELO]
• This position status signifies the proposed list of applicants selected for telephone interviews is awaiting review and approval by the DELO and UDO.

• Email the DELO (TBD) and UDO (dianne.woods@csueastbay.edu) (and cc the Admin) to let them know the proposed list of applicants selected for telephone interviews is ready for review and approval.

• For a dissenting opinion, please submit an email to Gina Traversa (gina.traversa@csueastbay.edu)

  ▪ DELO and then the UDO will review the proposed list of applicants selected for telephone interviews, as well as data on applicants, current workforce, calculated availability for the discipline, and faculty/student composition. After approval, the request will be submitted to the Provost’s office for review and approval.

  ▪ Provost’s Office Review and Approval –
    • DELO and UDO will change the position status to: **Screening 6 - Provost's Office Review for Telephone Interviews [Gina or Linda]**
    • After approval by the Provost’s office, notification will be sent to the Search Committee and telephone interviews can be conducted. Position status will be changed to: **Telephone Interviews and Reference Checks [Committee Chair]**

**Stage Seven: Conduct Telephone Interviews and Reference Checks Using Approved Protocol**

  ▪ Upload the telephone interview questions (from the FRP) in Interfolio under “Evaluation Settings, Criteria.”
    • Make sure to designate them appropriately, for example:
      o Phone Interview Question #1, …
      o Phone Interview Question #2, …

  ▪ **Reference Checks – for all applicants selected for telephone interviews**
    • Reference Check questions should be located in the Faculty Recruitment Plan, Page 4, IX (see Stage Three, above)
    • Reference Check results should be uploaded into Interfolio as an attached file (see Stage Eight, below)
Stage Eight: Obtain Approval for On-Campus Interviews – Search Committee

Approval is signified by the changing of the position’s status.

- After all approved telephone interviews and reference checks have been conducted, the Search Committee Chair should change the position status to: Recommendation for On-Campus Interviews [Committee Chair]

- For each applicant selected for on-campus interviews, change the Applicant’s status to “On Campus Interview” in Interfolio under a particular applicant’s name/file.

- In Interfolio, upload the following documents under “Internal Notes,” “Edit,” “Add File:”
  - Summary of the reference checks for all proposed on-campus interview candidates (one document/file titled: “Reference Checks Results”)
  - Summary of the locations from which the applicants will be traveling and estimated travel and lodging costs (one document/file titled: “Travel Costs for On Campus Interviews”)
  - Proposed on-campus interview questions (titled: “Proposed On-Campus Interview Questions”)
  - Proposed on-campus Rating Protocol (titled: “Proposed On-Campus Rating Protocol”)
  - Proposed on-campus interview schedule (titled: “Proposed On-Campus Interview Schedule”)
  - Ratings for the Telephone Interviews (by criteria, evaluator, and summary), if not directly scored in Interfolio, (titled: “Telephone Scores”)

- After all applicants selected for on-campus interviews have been designated and the required documents uploaded:
  - Change the position status in Interfolio to: Chair Review for On-Campus Interviews [Dept. Chair]
    - This position status signifies the proposed list of candidates for on-campus interviews and required documents are awaiting review and approval by the Department Chair.
    - Email the Department Chair and (cc the Admin) to let them know the proposed list of candidates for on-campus
interviews and required documents are ready for their review and approval.

- **Department Chair** – review the proposed list of applicants selected for on-campus interviews and uploaded documents. To approve:
  
  - Change the position status to: **Dean Review for On-Campus Interviews [College Dean]**
  
  - This position status signifies the proposed list of candidates for on-campus interviews and required documents are awaiting review and approval by the Dean.
  
  - Email the Dean and (cc the Admin) to let them know the proposed list of candidates for on-campus interviews and required documents are ready for their review and approval.
  
  - For a dissenting opinion, please submit an email to Gina Traversa (gina.traversa@csueastbay.edu)

- **College Dean** – review the proposed list of applicants selected for on-campus interviews and uploaded documents. To approve,

  - Change the position status to: **DELO and UDO Review for On-Campus Interviews [DELO and UDO]**
  
  - This position status signifies the proposed list of candidates for on-campus interviews and required documents are awaiting review and approval by the DELO and UDO.
  
  - Email the DELO (TBD) and UDO (dianne.woods@csueastbay.edu) and cc the Admin to let them know the proposed list of candidates for on-campus interviews and required documents are ready for their review and approval.
  
  - For a dissenting opinion, please submit an email to Gina Traversa (gina.traversa@csueastbay.edu)

- **DELO and UDO** will review the proposed list of candidates for on-campus interviews and required documents. After approval, the list will be submitted to the Provost’s office for review and approval, and the position status will be changed to: **Provost's Office Review for On-Campus Interviews [Gina or Linda]**

- **Provost’s Office Review and Approval** – after approval by the Provost’s office, notification will be sent to the Search Committee, and the position status will be changed to: **Conduct On-Campus Interviews [Search Committee]**
Search Committee can now conduct the On-Campus Interviews according to the approved procedures

Stage Nine: Submit Final Recommendation for Tenure-Track Hire

(1) Change the position status to: Final Recommendation [Search Chair]

(2) Submit a Memo Recommendation to Department Chair from Search Committee Chair making recommendation. All members of Search Committee must sign recommendation. Address strengths/weaknesses of each candidate and sources of evidence used. Change the position status to: Chair Review of Final Recommendation [Dept. Chair]

(3) Memo to Dean from Department Chair concurring or dissenting with Search Committee recommendation. Department Chair must include a recommended starting salary, years’ credit toward tenure, if applicable, moving/relocation funds if applicable, and start-up costs. Change the position status to: Dean Review of Final Recommendation [College Dean]

(4) Letter to Provost from College Dean concurring or dissenting from Department Chair recommendation. Dean must include a recommended starting salary and a request for years’ credit toward tenure, if applicable, moving/relocation funds if applicable, and start-up costs. Change the position status to: Provost’s Office Review of Final Recommendation [Gina or Linda]

(5) Complete pages 1 and 2 of the Faculty Appointment Recommendation Form (FARF), with all appropriate signatures – see:
http://www.csueastbay.edu/oaa/files/docs/policy-files/ARFTT.pdf

(6) Faculty Development Plan – for guidelines, see:

End Note

CSU Records Retention Requirements for Recruitment Records: (HR Technical Letter, Oct 13, 2004):
Typical documents: Applications, resumes, reference checks, writing samples, advertising records, rating sheets, etc.

Minimum Retention Period: Three years after close of recruitment

All documents will be retained in the Provost’s Office.