

MontanaTech

SEARCH CHECKLIST

- 1. DEVELOP PRA AND OBTAIN APPROVALS FROM YOUR DEPARTMENT HEAD/DIRECTOR AND DEAN**
 - a. It is recommend 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)
 - a. Additional questions may be asked in the application process to help screen candidates, a box at the bottom of the PRA is provided, contact HR for more information.

- 2. ESTABLISH SEARCH COMMITTEE AND NOTIFY PERSONNEL OF COMMITTEE MEMBERS**
- 3. SCHEDULE EEO MEETING (all committee members must be present)**
- 4. SET UP MATRIX ACCORDING TO THE PRA**
 - a. List required qualifications
 - b. Required skills
 - c. Preferred Qualifications
 - d. Preferred skills

- 5. SCREEN APPLICANTS** - Those that don't meet minimum qualifications will be identified for you, and should be included on the matrix.

- 6. COME TO A CONSENSUS AND RANK CANDIDATES ACCORDING TO TIER**
 - a. Top Tier
 - b. Middle Tier
 - c. Bottom Tier
 - d. Doesn't meet minimum Qualifications

- 7. MAKE AN APPOINTMENT WITH THE EEO/AA OFFICER FOR MATRIX REVIEW AND APPROVAL**
 - a. 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.

- 8. ONCE MATRIX IS APPROVED, CALL REFERENCES OF THE TOP CANDIDATES** – HR will send rejection letter to candidates that didn't meet minimums, so please provide HR with a copy of the matrix.

- 9. DETERMINE WHO YOU WANT TO INTERVIEW**
- 10. GET APPROVAL TO INTERVIEW**
 - a. Call or Send an email to the EEO/AA Officer explaining who the committee would like to interview

- 11. INTERVIEW CANDIDATES**

- 12. WRITE A MEMO DOCUMENTING THE PROCESS AND STATE WHO THE COMMITTEE WANTS TO HIRE AND WHY AND RANK ALL THOSE INTERVIEWED AND EXPLAIN WHY THEY RANK AS THEY DO.**
 - a. Memo must include:
 - i. Search committee members
 - ii. Specific information on why decisions were made regarding candidates
 - iii. Who the committee chose to interview and why

- iv. Ranking of those interviewed and specifics why they ranked as they did
- v. Who the committee would like to hire and why

- 13. BEFORE THE MEMO 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)
 - a. **FACULTY POSITIONS OR DIRECTOR / HIGH LEVEL PROFESSIONAL POSITIONS** – Must be approved by the Dept. Head, Dean, Provost and Chancellor
 - b. **CLASSIFIED STAFF** – Must be approved by the Dept. Head or Director
 - c. **MBMG** – Must be approved by John Metesh and Chancellor
- 14. MAKE VERBAL OFFER**
- 15. INFORM EEO/AA OFFICER/HR DIRECTOR OF ACCEPTANCE OR DECLINE**
- 16. IF ACCEPTED, SEND EMAIL TO EEO/AA OFFICER AND INCLUDE:**
 - a. Name of Candidate
 - b. Position
 - c. Salary/rate of pay
 - d. Start date – Notify HR if start date changes ASAP.
- 17. OFFER LETTER AND/OR CONTRACT GETS SENT OUT**
 - a. **Professional Offer Letters are handled by Victoria Pagan.**
 - b. **Faculty Offer Letters are handled by Colleen Fink – includes visiting, adjuncts etc.**
 - c. **Classified Offer Letters are handled by Cathy Isakson**
- 18. CONTACT HR/CATHY ISAKSON AND REQUEST REMAINING REJECTION LETTERS BE SENT**
- 19. SEND THE FOLLOWING DOCUMENTS TO HR/CATHY ISAKSON FOR THE SEARCH FILE**
 - a. **CONSENSUS MATRIX**
 - b. **REFERENCE CHECKS – QUESTIONS AND ANSWERS**
 - c. **INTERVIEW QUESTIONS/NOTES – QUESTIONS AND ANSWERS**
 - d. **FINAL MEMO – THAT INCLUDES (see above item 12)**
- 20. HAVE CANDIDATE REPORT TO HR ON FIRST DAY**