**CLA Faculty Recruitment Process**

**AY18-19**

*The most important principles are that all forms and steps in the search must be sent to the CLA Dean’s Office, rather than to the Provost’s Office, HR, or ODI, and* ***that you may not move from one step of the search to the next without seeking the requisite approvals.***

**STEP 1: Posting the Position**

Send to Assistant Dean Fiona O’Brien via email ([fiona.obrien@umb.edu](mailto:fiona.obrien@umb.edu)):

* Position advertisement—see Appendix A on page 4.
* Position Recruitment Form— [**https://hr.umb.edu/forms#7-hiring**](https://hr.umb.edu/forms#7-hiring)
  + Fiona will complete the majority of the form. Except:
    - D: Interview Exchange Posting
      * You may post until the position has been filled. You may close it once you have selected a pool of first-round candidates or keep it open in case you’d like a second chance to revisit the applicant pool; the latter is recommended.
    - E: External Posting Requests
      * Note: if your department has a membership to one of the websites, send Fiona the membership details; HR will ask for it and it inevitably delays the posting.
      * list any other publications (print or online), newsletters, list-servs, or conferences that the department wishes us to use to recruit for the position. All advertisements are placed in external publications by HR via UMB ad agency only; departments may not place external ads, though they may share the info with colleagues, post it on list-servs, flyers, and the like.
    - H: Search Committee
      * Note: your committee is required to meet the diversity requirements.
      * Your department administrator will be listed as an *ex-oficio* member so that s/he can access Interview Exchange and assist with the applications.

Fiona will get the Dean’s approval and move the paperwork to the Provost’s office for their review; it will continue to move along the approval pathway. Fiona will send you the ODI/HR email that confirms the position is ready to post.

**STEP 2: Using Interview Exchange to** **select first-round candidates.**

*Logging into Interview Exchange*

Once the position has been posted, your committee members will receive an invitation to access the applicant pool in Interview Exchange. At Interviewexchange.com, select the “Customer Sign-in” and enter your UMB credentials (UMB email + password).

*Using Interview Exchange*

You may use Interview Exchange to communicate with committee members by making notes about a specific candidate—however, HR and ODI have access to view these notes. You can view CVs, cover letters, letters of recs, and any other materials the applicant submitted.

*Requesting Letters of Recommendation via Interview Exchange*

Each search committee member has an access role in Interview Exchange. Most members are “reviewers”; the search committee chair should be assigned as the Hiring Manager. Only the Hiring Manager(s) have the ability to request the LOR in Interview Exchange. (You can determine who is listed as the Hiring Manager by going into Interview Exchange, clicking on the job, then clicking on “reviewers” at the top—this lists who has access to the applicant pool and what their role is).

* Hiring Manager clicks on the applicant’s name.
* above “references” there should be a link that says, “Request candidate references” – the other reviewers don’t have this link on their page.
* You are done at this point; the letters will post in IE once they are submitted
  + If the applicant uses Interfolio, IE will request the letters from Interfolio and post them quickly.
  + If the candidate does not use Interfolio, IE will send a request to the reference to upload a letter.

*Moving forward with First-round candidate interviews*

You many not contact any applicant regarding interviews until you have the approvals: Dean, Provost, ODI. To start the approval process, send Fiona via email (the info can be provided right in the body of the email; no forms required at this stage):

* List of semifinalists’ names and CVs.
* Rationale for selection—this can be done for each candidate and should be only a sentence or two.
* List of interview questions

Fiona will notify you once ODI approves the semifinalists and you can contact them to set up the interview (typically at your annual conference or Skype). Please keep in mind that only those persons who meet minimum qualifications can be considered as part of the applicant pool; **once you have deemed a candidate unqualified, he/she cannot be considered at a later time, if the pool narrows**.

*Interviewing First-round candidates*

You may choose to interview via Skype or your annual conference. If you are sending faculty to interview at a professional meeting, please email Fiona O’Brien ([fiona.obrien@umb.edu](mailto:fiona.obrien@umb.edu)), the names of the faculty members traveling and the CLA Dean’s Office will pay for travel, registration and three (3) night hotel stay for two (2) people. Members of search committees should make travel arrangements using a B.T. (CON3 Travel Auth.) through their department administrators. Search committee members should use their department Procard to pay for registration fees. Please use your own credit cards for hotel reservations. Original receipts for the hotel should be submitted to the department and then forwarded to ([eddie.sze@umb.edu](mailto:eddie.sze@umb.edu)) in the Dean’s Office for reimbursement as soon as the faculty members return to campus.

**STEP 3: Selecting Finalists for on-campus interviews.**

Upon completion of your first-round interviews and once your search committee has identified the finalists, please forward to Fiona the following for the dean’s approval:

* List of finalists
* A memo or email with a sentence or two about why you chose each of these particular finalists for an interview

Once the Dean, Provost, and ODI have reviewed the pool, you will be notified that you may proceed to schedule finalists for interviewing.

***Refer to Appendix B on pages 5-7 or the document “CLA Search Expenses” for the logistics of the finalist interviews.***

**STEP 4: Making an offer**

When a candidate is selected and recommended for hire, please submit the following forms electronically to Fiona O’Brien for the dean’s approval and signature:

* Signed ODI Hiring Report; available on the ODI webpage:

<https://www.umb.edu/odi/search>

* ODI Selection Data form; available on the [ODI webpage](http://www.umb.edu/odi/search):

<https://www.umb.edu/odi/search>

* Three letters of recommendation for the first-choice candidate

Upon the Dean’s approval, the above materials will be forwarded to the Provost’s office and ODI for review and approval. **The unit or dean may NOT make any offers—formal or informal—until notified that both ODI and the Provost have approved the candidate**. The Provost’s office will inform the Dean and Department Chair (usually by email) that they have approval to proceed to make an offer. Upon approval from the Provost, the Dean (or the Dept. Chair with permission from the Dean) may extend a verbal offer to the candidate.

In addition, once final approval has been attained, the dean will draft the official offer letter to the candidate using approved templates from the Provost’s office. The dean will submit a draft of the offer letter (via email) to the Provost’s office for approval of the terms of hire.

Once the candidate has officially accepted the terms specified in the offer letter, Fiona will prepare a personnel action and an Offer & Acceptance form (AKA the “contract”) and forward them to the Provost’s office, who will assure the consistency of the terms with the offer, sign, and send the original contract back to Fiona.

**APPENDIX A: Required Ad Text for Faculty Searches**

All advertisement texts must include:

* Title of position (faculty rank or ranks available)
* Start date (e.g. “9/1/2018” or “September 1, 2018”)
* Minimum requirements (earned doctorate or other terminal degree in X field)
* Application instructions, e.g. cover letter, vita, and X number of recommendations (typically 3), along with any other items (writing sample, dossier, portfolio example, research statement, personal statement, etc.) you wish all applicants to submit. Applications are submitted via Interview Exchange and Human Resources will establish the IE application address for online submission.
* One of the following phrases at the end of the ad:

*UMass Boston is an Affirmative Action, Equal Opportunity Title IX employer*

OR

*UMass Boston is committed to building a culturally diverse faculty and staff and strongly encourages applications from women, persons of color, individuals with disabilities, and covered veterans.*

* be sure to add any specific details suggested by David.

Ad texts are drafted by departments, reviewed by the Dean, reviewed by the Provost, and then sent to HR for inserting the application link. Once finalized, they are returned to departments for recruitment/outreach.

All advertisements are placed in external publications by HR via UMB ad agency. Exceptions may be made when there is a no-cost placement in a discipline-specific publication or when a publication has a member discount or other requirement. In these exceptional cases, the department works with HR to ensure correct placement.

**APPENDIX B: On-Campus Interview Logistics**

**On Campus Finalists Interviews**

For on-campus visits, the CLA Dean’s Office will pay for three (3) candidates per search. Should you wish to bring in more candidates, it will be at your department’s expense.

**Candidate Travel:**  All transportation arrangements will be made by the Dean’s Office. We can arrange travel by air, train, or bus. A template with the information below can be found on the [CLA website here](https://www.umb.edu/academics/cla/info_for_faculty/forms_and_deadlines). The department/committee will need to obtain the following information from the candidate for:

**Domestic Travel**

* Preferred method of travel:
  + Drive yourself: we will cover your parking expense at the hotel;
  + Train: Which station would you leave from and return to?
  + Air: Which airport(s) do you wish to leave from and return to?
* Time considerations for departure, what is the earliest flight:
* Name as it appears on whatever form of identification you will use at the TSA screening point:
* Date of birth:
* Gender:
* Cell phone number:
* If travel is **International** :
  + Passport Number:
  + Country of Passport:
  + Date of issuance:
  + Location of issuance:
* Whatever other parameters (airline preferences/frequent flyer numbers/seating preference):

The department/committee will need to email to ([louise.putnam@umb.edu](mailto:louise.putnam@umb.edu) and [eddie.sze@umb.edu](mailto:eddie.sze@umb.edu) ) the following:

* The candidate information as per above
* Name of the dept. search committee chair
* department name
* dates of travel

**Candidate Hotel:** Arrangement for the candidate’s one to two nights hotel accommodations should be made by the department as outlined below. There are templates for a reservation request on the [CLA Website for Faculty and Staff in the section “Forms and Deadlines”](https://www.umb.edu/academics/cla/info_for_faculty/forms_and_deadlines) under the Department Administrator Quick Links.

Please use your GOF account to create a PO for the hotel, and then the Dean’s office will reimburse the department GOF account. The two hotels the university uses are listed below. It is important that you telephone BOTH hotels, identify that you are calling from UMB, and find the BEST rate before committing.

**Courtyard by Marriott – South Boston**Email: 'Courtyard By Marriott Reservation' [reservations@courtyard.com]  
Phone: 617-436-8200  
Address: 63r Boston St. Boston, MA 02125

Negotiated Rate for UMB approximately $200 per/night for a standard room  
Vendor# 0000059063

**Doubletree Hotel Boston Bayside**Email: [www.doubletree.com](http://www.doubletree.com)  
Phone: 617-822-3600  
Address: 240 Mt. Vernon St. Boston, MA 02125

Negotiated Rate for UMB approximately $200 per/night for a standard room  
Vendor# 000019426

Please note: should you choose to use a different hotel, **your department will be responsible** for the difference in cost per night per candidate.

The invoices from hotels should be forwarded to Eddie Sze

([eddie.sze@umb.edu](mailto:eddie.sze@umb.edu) ) in the Dean’s Office. Please attach to the invoice a memo with the following information:

* department name
* candidate’s name
* interview date

**Candidate Expenses**: If the candidates have reimbursable expenses (such as parking, taxi, baggage fees, etc.) they need to become an UMass approved vendor on the PeopleSoft system before they can be reimbursed. Please ask your dept. administrator to prepare the following and forward to Dorothy Packard in the Controller’s Office:

* [Vendor Add form](https://www.umb.edu/controller/forms)
* [W-9 (needs to be signed by the candidate)](https://www.umb.edu/controller/forms)
* International candidates require several other forms. Please contact Eddie Sze ([Eddie.Sze@umb.edu](mailto:Eddie.Sze@umb.edu)) for more information

Please ask the candidates to send their original receipts to your department administrator. Once the candidate is listed as a vendor in the UMB system, the department administrator needs to complete a Disbursement Voucher (leaving the account number blank) and attach to it the ORIGINAL receipts, and bring all to Louise Putnam ([Louise.Putnam@umb.edu](mailto:Louise.Putnam@umb.edu)) in the Dean’s Office for account numbers, final review and submission to the Controller’s Office.

You **CANNOT** charge alcohol to the University’s accounts.

**Dinner reimbursement**: The search committee member who paid for the dinner should submit his/her itemized receipt(s) to your department assistant, who should in turn fill out a CON 4 (Business & Entertainment Authorization Form) and a CON 7 (Employee Business Expense Reimbursement Form) and bring it to the Dean’s Office for the account number and signature. The maximum we reimburse for the dinner, three members and candidate at $35 each, is $140.00. The food/beverage must be itemized on the receipt. A receipt with the total only will not be accepted. If a receipt totals more than $140.00, the host department will be responsible to cover the overage.

**Lunch reimbursement:** The CLA Dean’s Office will support 10-12 people, including the candidate to have lunch on campus. Please use your department Procard to pay for the candidate’s lunch. If for some reason you do not have a department Procard yet, please contact Kim Ho ([kim.ho@umb.edu](mailto:kim.ho@umb.edu) ) in the Dean’s Office to request that the Dean’s office Procard be used in the interim. Once your searches are complete, please e-mail a list of Procard lunch search expenses and a copy of the receipts to Kim Ho in the Dean’s Office ([Kim.Ho@umb.edu](mailto:Kim.Ho@umb.edu) ) and she will transfer funds from the Dean’s Office GOF account to your dept. GOF account.

Please designate someone in your department to be a Procard owner for future purchases. Eddie Sze in the Dean’s Office can assist ([eddie.sze@umb.edu](mailto:eddie.sze@umb.edu) )

**Meeting with the Dean:** Candidates should meet with the Dean when they are on campus. Please contact the Dean’s assistant ([louise.putnam@umb.edu](mailto:louise.putnam@umb.edu)) to schedule these meetings. If it is impossible to schedule a meeting with the Dean, then they should meet with Associate Dean Pratima Prasad or Associate Dean Jane Adams. The Provost will not be meeting candidates for all positions, and so you should consult with the Dean about whether a meeting with the Provost should be included.