University of Wisconsin-Madison School of Education
Faculty Search Process Chronology

Questions?
Please contact teri engelke at teri.engelke@education.wisc.edu
or Carolyn Kelley at carolyn.kelley@wisc.edu

The School of Education's Recruitment, Assessment and Selection (RAS) plan can provide a great deal of information and serve as a resource for selection and searches. You can find the RAS plan at: [https://tinyurl.com/y6u4bq6c]. Below is a more detailed guide to Faculty hiring.

1. **Hiring Priorities and Rationale.** When a vacancy occurs, due to a retirement or resignation, it provides the department an opportunity for conversation about the direction of the department and decisions to build on an area of strength or to fill in gaps. It should not be assumed that there will be automatic search for a replacement. Rather, through departmental conversations create a clear request and rationale including budgetary considerations to present to the Dean.
   Timing: The request for a faculty search should be submitted to the Dean in May before the end of the academic contract year.

2. **Present the search request to Dean Hess (with the attached form).** The position requests should be presented with clear statements about the rationale and how you plan to pay for it; if you have more than one position, rank the positions and have rationale for each. If possible, conversations about options for funding positions should be brought up in the budget meeting with the Dean and Associate Dean for Administration; this will provide information about how much you can spend and what the impact may be on other aspects of the department. Be prepared to provide the Dean information about which courses or levels/areas of courses the faculty member will likely teach, along with the current enrollment in those areas/courses. Also explain what the other faculty in that area are teaching so it is clear why this faculty position is needed. This proposal is **necessary** in order to get approval from the Dean for any searches. Send to Dean Hess, the Senior Associate Dean, and Melissa Amos-Landgraf.
   Timing: In the spring semester or as a part of step 1 conversation.

3. **Appoint a search committee and finalize the Position Vacancy Listing (PVL):** Once the Dean has approved a search, formally pull the search committee together. The search committee can provide feedback on the PVL and REP (Recruitment Effort Plan). Your own department may have another step in the process, such as approval by the Personnel Committee. The Department Administrator will be able to develop the PVL and REP in the correct format and submit the final version into the campus system. Before developing the PVL, the chair of the search committee should meet with teri engelke to discuss strategies for enhancing the diversity of the search pool or (have) attend the search chair/committee training provided.
   Timing: As soon as the Dean approves the search, you can begin this step.

4. The Department Administrator enters the information into the PVL in final form and electronically submits it to the Business Office for approval. The position may not be posted in any form or location until the PVL has been officially released.

   TREMS (Talent, Recruitment, and Engagement Management System) is the campus job applicant system that we use for all recruitments.

5. **Responding to and reviewing applications:** TREMS has built in communication through the search process, the support staff member will be trained in working with applicants and the system to ensure that the process and appropriate communication is being sent along the various search steps. Please be sure to keep your search support staff member informed of candidate statuses throughout the search.

Please also see the School of Education Recruitment, Assessment & Selection (RAS) Guide for detailed information of the following steps.

6. **Screening Applications:** Following the process the committee has decided on to screen applications, the search committee should develop a short list, which may be any length from about (approximately) 5 to 10, of candidates the search committee has decided on as the group they are moving forward in the process. (Each department should follow its own procedure for involvement of faculty outside the search committee in this process). There is no specific number, rather qualified candidates demonstrating excellence based on job qualifications, required and preferred should be considered.

   Timing: Reviews of files can begin at any time after the applications begin arriving. However, no decisions about ranking may be made until the closing date (which is phrased as "ensured consideration date"), this means you are under no obligation to consider applications that are submitted after that date. If you do wish to include applications that are received after the assured consideration date you must consider all received late up to that next date determined.

7. **Phone/Skype Interviews:** The search committee will come up with a set of questions that they will ask every candidate being interviewed to have an ability to compare consistently, the committee can ask additional or follow up questions, if relevant to the position. These may be questions you send them in advance. It is generally a good idea to stick to a time limit. These interviews have often changed the ranking of candidates that the committee had originally done based on the applications. Note: Some departments, such as Art, do a large number of interviews at their national conference to determine who should be brought to campus for interviews. This is considered a good substitution for this step.

   All committee members should be interviewing all candidates. If a committee member will not be able to attend an interview, you could request to record the interview with the candidate so the missing committee member can still assess the interview. If one committee member will not be able to attend the majority of the interviews, then they should not attend or assess any of the interviews for this phase; they can then return back into the process. This keeps the assessment of candidates fair and equitable.

8. **Approval to bring select candidates for on-campus interviews:** Usually, there is a request to bring in approximately three candidates, but more may be considered (and very rarely fewer) if there are special circumstances. Present the Dean with the short list after completing interviews outlined in step 8, along with the CVs for approval. The Dean will want to know about the size and strength of the pool and something about the process that led you to these candidates as finalists.

9. **On-campus Interviews:** The Business Office can explain what may be paid for and how to handle payments and receipts. The search committee should plan the activities that every candidate will be involved in, such as research presentation, meeting with individuals or groups of faculty, meeting with graduate students or undergraduates, lunches, dinners, etc.

   Schedule a meeting with Dean Hess for each candidate, if she is not available, an Associate Dean may do the interview. In addition, schedule an interview with Associate Dean Bob Mathieu so he can discuss the potential relationship between their work and WCER, if appropriate (for example, Art and Dance candidates are not very likely to put grants through WCER, but it is possible). If the candidate has technology needs beyond the basics, you can schedule a meeting with MERIT to discuss what is available through the SoE. Also ask the candidates when scheduling the visit if there are particular people or categories of people they would like to meet, such as someone who works in their research area who is outside the department or the SoE, or the Chair of a Program or department with which they might want affiliation (for example, we have had requests to meet with Chairs of the Department of Gender and Women's Studies and the American Indian Studies Program). Gather feedback from faculty and others who have met with the candidate; this can be through a form that has a numerical rating system and room for comments.

Please provide those involved in the interview process the handout titled, *Appropriate & Inappropriate Question Areas* to ensure that our candidates are not being asked questions at any point that are not allowed.

10. **Submit a "Request for Authorization to Reimburse Applicant Interview Expenses" to the Business Office for *each* candidate you are bringing to campus:** This form can be found at http://www.bussvc.wisc.edu/acct/Policy/travel/interview.html. Please contact Toby Schellhase in the Business Office if you have any questions (262-1765, toby.schellhase@wisc.edu) for more information.

11. **Candidate Experience:** Remember this visit is about both whether the department wants to hire the candidate and whether the candidate wants to come. Treat them all as if they are future colleagues. Remember you are recruiting, so give them a positive and realistic view of Madison. We want to be represent UW-Madison, the School of Education, and your department in an accurate and positive way; as we are not only seeking a new employee but someone to join our community.

12. **Departmental Decision to offer the position:** Each department has its own procedure, but usually the search committee makes a ranked recommendation that then goes either through Personnel and then to the Executive Committee or directly to the latter. The Executive Committee determines who will be offered the position, but others, such as assistant professors, may participate in the discussion and vote if the Executive Committee has approved their inclusion in the Executive Committee meeting for this purpose.

13. **Notify the Dean's Office about the decision and get final approval for hire.** This can be done by the Department Chair and/or the Search Committee Chair. The Chair should already have a clear, idea of the salary range, based on budget meetings and other discussions with the Deans. If there is anything that might make the offer more expensive or complicated, please let the Dean's Office know so that a funding plan can be constructed for the increase (for example, an assistant professor may be a very senior at a university that pays very high salaries). The Department Chair and the Deans will need to discuss this.

14. **Call the top candidate to let her/him know that the department has voted to offer him/her the position.** Give the candidate an idea of the starting salary and the kinds of research support available, without promising anything you cannot deliver. For example, you can say you will probably be able to get flexible research funds from the Graduate School but don't specify how much. Ask the candidate if there are any specific needs they have in order to be able to accept the position. Do not ask for a wish list.

15. **Develop a start-up package:** A start-up package should be personalized. Find out if they have specific technology needs, equipment, etc. Discuss possibilities of course releases. Contact the Senior Associate Dean and she will contact the Graduate School to request start-up funding and confirm with the Business Office regarding computer packages and moving/relocation expenses. Be sure to highlight any specia1 requirements they have that may cost more than standard start-up packages. Contact MERIT about specific technology needs to see what is available. **Don't assume what the Dean's Office will provide - ask and clarify.** Be creative about what might make the job appealing.
    Moving Expense Information: http://www.bussvc.wisc.edu/acct/forms/relocation_reimbursement.html.
    Relocation Guide: http://www.bussvc.wisc.edu/acct/policy/travel/EmployeeRelocationGuide.pdf

16. **Dual career couple hires:** If the candidate asks for a position for a partner or spouse, get as much information as possible about what kind of position. Get a CV or resume and then contact the Senior Associate Dean to discuss. Usually, the Chair and the Senior Associate Dean work together to contact appropriate chairs, directors, etc. If the partner/spouse wants a position outside the University, Laurie Mayberry, in the Provost's Office can help with these types of employment options. If the position sought is at UW, there will be negotiations between chairs, departments, schools, and the Provost's Office. This can be long and complicated. It is important to keep the candidate informed of the progress. The conversations with the Provost's Office about funding are done through the Dean's Office, specifically by the Senior Associate Dean. The formal request must be done through the Dean's Office; the Senior Associate Dean will take the

lead on the request and may need to have the Department Chair prepare part of the request or provide information.

17. **Faculty Strategic Hiring Initiatives (SHI):** The Provost's Office funds strategic initiatives for recruitment and retention of high-priority faculty hires; in particular Dual-Career Couple Hires and Tenured/Tenure Track Minority Faculty Hires. The expectation is that, as much as possible, the funding would come from the School or College and that SHI funding would be used to make the offer more attractive (for example, Anna Julia Cooper Postdoctoral Fellowship) or to be able to offer a second position to an excellent candidate from one search to increase the diversity of the faculty. For both of these, the Dean's Office, Senior Associate Dean will lead the formal request, with the support and information provided by the Department Chair. (http://provost.wisc.edu/facshi.htm)

    A. Tenure/Tenure-Track Minority Faculty Hires: *Funding is available for recruitment or retention of targeted minorities defined as Hispanic, American Indian, Alaskan Native, Black, Asian and Pacific Islander (in areas where they are under-represented). Funding for the Anna Julia Cooper Post-Doctoral Fellowship is available when the fellowship offer is coupled with the offer of an assistant professorship.*

    B. Dual Career Couple Hires: *Dual-Career Couple funding may be used to recruit or retain a tenure-track faculty member by hiring the spouse/partner into a faculty tenure-track or tenured position or a long-term academic staff or classified position. (Priority will be given to dual-career hires that will contribute to faculty diversity; i.e. where hiring the partner/spouse will help in hiring or retaining a targeted minority or woman faculty member.)*

18. **Discuss the offer with the candidate:** Before sending the letter of offer, review the offer information with intended hire, if there are any parts that are negotiated and changed that can occur prior to sending out the offer letter, this reduces the need to send out revised offer letters.

19. **Offer letters:** We have template offer letters available on the SoE Business Office website (Human Resources), if you are unable to locate them please contact teri.engelke@education.wisc.edu for an electronic copy. Carefully modify them for your candidate. The offer letter should be considered a form of contract or agreement that is binding, so it is important to do these carefully. Include specifics such as reimbursement for moving expenses up to $xxx, flexible research funding from the Graduate School or elsewhere, course release, etc. It is very important that the expectations are very clear for the new faculty member about what UW will provide. Offer letters are part of the tenure dossier, which is essential if a faculty member has a split appointment, duties that are not standard (such as required outreach work), etc. If there is anything unusual about the appointment, make sure that is clear in the letter. Establish the tenure clock by working with the Dean's Office and the candidate. It is possible to roll back the clock for more senior assistant professors (see http://www.secfac.wisc.edu/FPP_ch_7.htm#7.03.) while still allowing them to come up early if they are ready. The year for tenure review should be in the letter. The Business Office will check through the offer letters to make sure they are complete before they are sent out. Please send a draft of the offer letter to the Assistant Dean for Human Resources in the Business Office. **Both the Dean's Office and the Business Office need copies of the final offer letter to ensure obligations are met and files are complete. Please be sure to note them as cc'd in the letter (**This will be included on the template letters provided on the RAS resources)**.** The offer letter is then uploaded into the TREMS program for the final offer and acceptance to be made.

20. **Candidate Communication:** While you are waiting for your selected candidate to say yes, be in touch without nagging; you could check in with them to see if they have any questions or information that would help them with their decision Also, keep other candidates you interviewed informed. Don't say no to them unless the first choice has definitely accepted; this is a delicate issue to balance. If/when the answer is no, call the unsuccessful candidates who were interviewed. They deserve more than a letter or e-mail; this reduces hard feelings and with highly networked fields colleagues talk with one another, we want to continue to

demonstrate that UW-Madison and the School of Education is a high quality place to work, teach and pursue research.

21. **When the candidate accepts or declines the offer:** Notify the Dean's Office and Business Office in either case. If the candidate accepts, provide the Dean's Office and the Business Office with a copy of the acceptance. If someone declines, move on to the next one on the list *only if* you really want to hire that person. If you have a "failed" search because you thought the remaining candidates were not strong enough, you will likely get to search the next year; it is better not to hire than to hire a weaker candidate just to fill the slot. Also, please inform the Dean's Office about the reasons for the non-acceptance of the offer, and the Business Office so the search can be closed out.

22. **Onboarding your new Faculty Member:** Even before your new faculty member arrives to campus, there is a number of things that you can do to assist with their transition and help them feel welcome. Please see the Onboarding Policy, program and resources available.