Guide to Effective Staff Searches

Talent Acquisition

THE OHIO STATE UNIVERSITY
HUMAN RESOURCES

A Guide to Effective Searches

The Ohio State University carries forward its mission to deliver quality teaching, research and service. One way we advance our mission is through search efforts. In every search effort our commitment is to diversity, quality and excellence in order to fulfill the institutional mission. The goal of a search committee is to recruit the most diverse applicant pool and select the best candidate to become a member of the university community. A Guide to Effective Searches was developed as a resource to assist search committees through the recruitment and selection process.

The guide facilitates the recruitment efforts of the search committee by providing information on advertisement, hiring search firms and many other resources to assist in the expansion of the candidate pool. The guide enhances the selection process and ensures that it is legally sound by offering specific materials about the process of evaluating, interviewing, reference checking and extending offers to candidates. In addition, the guide offers information to search committees concerning affirmative action strategies that heighten the opportunities to recognize, learn and value the contributions and experiences of all.

The role of search committees is vital to the attainment of excellence through diversity. No other committee at the university level has a greater ability to make a profound and substantive institutional impact. Help us attain diversity by hiring the "best" candidate while strategically diversifying the university community.

Talent Acquisition, located in the Office of Human Resources, provides consulting services that promote, reinforce, and deliver the university's talent acquisition strategy by partnering with colleges and VP units to navigate through established hiring processes. This is a free resource offered through OHR to the university community. Services offered through Talent Acquisition include:

Position descriptions	• Provide consistency with University branding by providing formatted (standardized) templates • Assist with the development of position descriptions – defining the organization, creating engaging content around the department and position environment, creating descriptive content around established job duties and aligning competencies and skill sets to the essential functions to the job • Work with Compensation to benchmark and price positions
Posting	• Review and approve job openings in PeopleSoft • Help troubleshoot technical problems in job openings • Consistently edit and post positions in PeopleAdmin • Advise units based on the university's posting policies • ☐ Advise and audit units on CCS recruitment policies
Advertising positions	• Facilitate the placement of external ads through an agency • Retrieve approved eRequests from units to recoup advertising costs • ☐ Liaison for all inquiries between hiring units and the advertising agency
Intake meetings with hiring leaders / search committees	• Conduct informational meetings with stakeholders – hiring leaders, HR partners and key partners to the position to learn about the skills, knowledge and abilities needed for a candidate to be successful in the role • Environment analysis – reporting structure, candidate attributes, leadership styles and internal/external partners this position would engage • Outline (define) recruitment strategy and overall hiring timeline • Define interview process – who would be involved, where interviews will be located, etc • Identify networks and/or associations and other recruiting resources to identify and engage qualified talent •
Sourcing candidates	• On-site research recruiter available to identify and engage passive candidates • Utilize various methods to identify passive candidates • Connect with passive candidates, sharing information about the opportunity and general information regarding employment at the university to engage them in the search process • Answer questions and identify potential obstacles that may prevent a candidate from accepting a position if selected

Screening candidates	• Review resumes and application materials to verify alignment of skills and experience with the objectives of the role • Conduct initial phone interviews with candidates to confirm interest, explain the role and environment, answer questions related to working at OSU and identifying compensation expectations.
Candidate presentations	• Provide candidate summary to hiring leaders / search committee members • Make recommendations based on information obtained during phone screen
Interview Guides / Executive Booklets	• Create position-specific interview guides based on competencies and soft skills required or desired for the role • Provides consistent methods of evaluation • Ability to create multiple versions for interview panels
Candidate Care	• Campus visit coordination – work with support staff to organize availabilities • Scheduling interviews – travel, hotel, transporting candidate, etc • Provide updates throughout search process – maintain communication with candidates
Reference Checks	• Conduct reference checks on identified final candidates • Provides consistency with candidate evaluation
Offer Letters	• Provide support to HR partners and hiring teams in drafting letters of offer to candidates • Conduct verbal conversations addressing concerns or questions • Confirm details involving start dates, reimbursements, relocation, benefits information, compensation negotiation and provide information regarding next steps / onboarding
Disposition Candidates	• Contacting candidates that were not selected to move forward in the process, providing feedback if warranted • Dispositioning candidates in the applicant tracking system and close out job opening • Share talent
Relocation	• Provide consultation on the university's relocation policy • Collaborate with hiring units regarding reimbursements • Provide recommendations on vendors and other relocation services
Onboard	• Collaborate with hiring unit to ensure smooth transition • Provide consultation on new hire best practices
Stay interview / 30-60-90 day check ins	• Conduct electronic new hire survey • Touch base with candidates on a 30-60-90 day basis

Recruitment Phases

Phase One
Discovery & Consultation

- Chair/Hiring Manager determine need and contact OHR Recruiter (When using an executive search firm contact TA team)
- Chair/Hiring Manager, SHRP and Recruiter conduct in-take meeting to review scope of role and proposed SLA
- Recruiter/SHRP works with OHR Compensation to get benchmarking data and posting range

Phase Two
Post, Review & Screen

- Recruiter/HRP to post position on jobsatOSU.com and advertise in predetermined outlets
- Recruiter/HRP utilize the Diversity Resource Guide to ensure diverse applicant pool
- Recruiter/HRP review and screen submitted resumes. Reach out to passive candidates
- Recruiter/HRP conduct phone screens, confirming comp, and select candidates for presentation
- Recruiter/HRP present candidate pool to Chair/Hiring Manager for selection into Phase Three

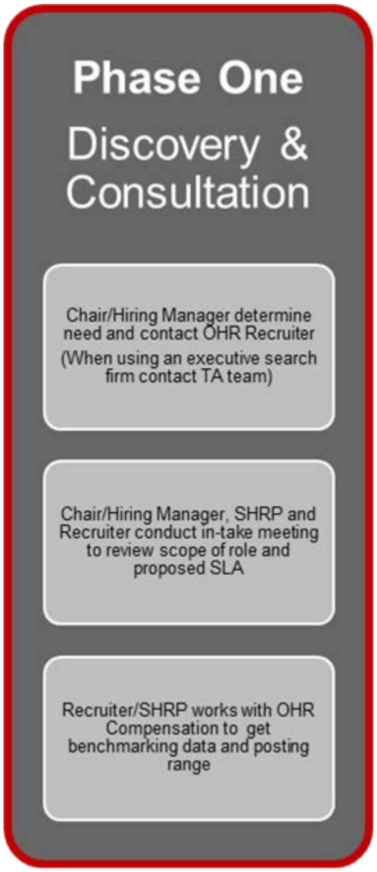
Phase Three
Interviewing

- Talent Coordinator/HRP arrange interview logistics

  Recruiter/HRP build interview tools
- Recruiter/HRP conduct interviews with predeterminded committee members/stakeholders
- Recruiter/HRP debrief interviews and determine next steps
- Recruiter/HRP to check references on final candidate(s)

Phase Four
Offer & Disposition

- Recruiter/HRP to prepare an offer for the final candidate
- Recruiter/HRP presents candidate with offer
- Upon successful background check the recruiter/HRP will disposition all other candidates



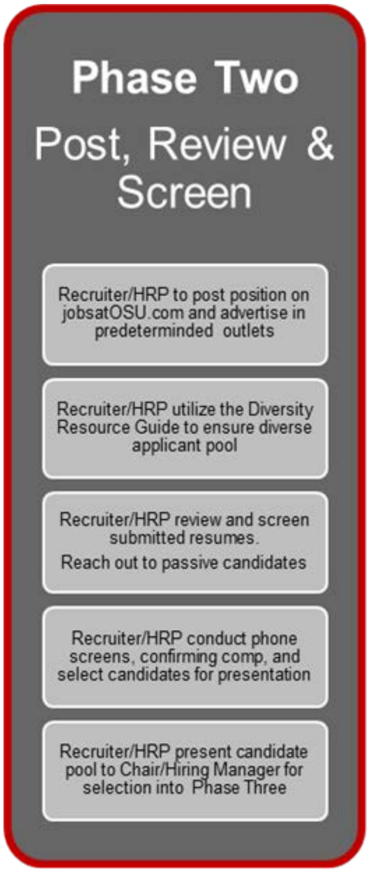
Phase One: Discovery and Consultation

The position need has been identified and you are ready to initiate the search process. Some things to consider include:

1. Who will be involved in the search?
2. Determine if a search firm will be utilized – Call Talent Acquisition if this is the case.
3. Has the scope of the role been defined?
4. Has a budget been identified for the search?
5. Who will be responsible the administrative tasks
6. Has a position description been created/updated – this includes a detailed description of the duties and responsibilities of the role, job code, required/desired qualifications determined?
7. Has the position description been reviewed and benchmarked by Compensation in the Office of Human Resources (OHR)?
8. Obtain input on advertising venues
9. Additional details – location of position, technology needs, etc?

Phase One Tools

- Attachment 1a- Talent Acquisition Services
- Attachment 1b- Intake Document
- Attachment 1c- Managerial Leveling Characteristics
- Attachment 1d- PD Template
- Attachment 1e- Advisory Committee Considerations
- Attachment 1f- Position Advertising Form



Phase Two: Post Review & Screen

I. At this point, you are ready to move forward with posting the position

1. Connect with your HRP/Talent Consultant to initiate the HRA
2. In coordination with your HRP/Talent Acquisition Consultant:
   a. Develop, update, or review position description.
   b. Identify essential and marginal functions of position.
   c. Identify required and desired qualifications, corresponding with essential job functions.
   d. Ensure position description shows no bias regarding race, color, creed, religion, sexual orientation, national origin, sex, age, disability, or veteran status.

3. Keep in mind this is the first time the candidate will see this position. Use this as an opportunity to promote the benefits of the position, the college/unit. (include a word doc on position profiles?) Also highlight the benefits of working OSU and focus on the "why" for the candidate.

II. Organizing the Search

1. Schedule a meeting with those that will be involved in the selection process:
2. Share the position description
3. Include diversity and inclusion resources (Diversity Resource Guide)
4. Provide an overview of the timeline and create a recruitment strategy
5. Identify an individual to handle notes, correspondence, travel arrangements, and itinerary for candidates who visit the campus
6. Develop timeline for search, including application deadline, interview schedule, and target dates for submitting recommendations.
7. Determine materials to be submitted by applicants:
8. Cover letter expressing interest and describing qualifications
9. Resume or curriculum vitae
10. Other
11. Identify person/office to whom applications/nominations will be submitted.
12. Determine where records will be kept. Search process records must be maintained for three years
13. Identify strategies to ensure widest possible pool of applicants
14. Discuss potential biases and ways to ensure their elimination from the search process
15. Contact Office of Human Resources Talent Acquisition review the composition of the applicant pool (race, gender, disability, veterans).

III. Advertising the Position and Expanding Applicant the Pool

1. The Office of Human Resources, Talent Acquisition team, is available to provide assistance in preparing recruitment advertisements and recruitment services.

2. Submit position data and position description information via the Human Resource System (HR System). Upon position approval, create a job requisition in HR System to advertise the position in the University Personnel Postings (UPP).
3. Determine market for position, develop advertisement, including official affirmative action statement and application/nomination procedures. The Office of Human Resources, Employment Services, is available to assist with advertisements.
4. Obtain a statement of prior approval from an appointing authority if using a search firm.
5. Identify appropriate national/local publications and/or advertisement forums. Consider the Faculty and Administrator List via University Mail Services.
6. Identify publications that serve women, minorities, individuals with disabilities, and veterans.
7. Identify individuals, institutions, and agencies to receive position announcement.
8. Submit position announcement to publications and other advertising sources.
9. Expanding the Pool of Candidates
10. Contact minority/protected group caucuses of professional organizations.
11. Talk with faculty or staff who are members of protected groups for help in identifying applicants or ask if they have colleagues who can assist in the search.
12. Contact colleagues across the country to identify potential applicants.
13. Personally encourage internal and external applicants to apply.
14. Identify other strategies to ensure widest pool of applicants.

IV. Affirmative Action Statements for Advertisements:

1. As an equal opportunity, affirmative action employer, all advertisements and announcements for university positions must be in compliance with the university affirmative action program and with state and federal regulations.
2. The following have been approved for use in all recruitment advertisements and announcements:
   a. Required Tagline for Job Postings: “EEO/AA employer”
   b. Recommended (Optional) Tagline for Job Postings: “To build a diverse workforce Ohio State encourages applications from individuals with disabilities, minorities, veterans, and women. EEO/AA employer.”
   c. (Optional – DT boilerplate statement) “The Ohio State University is committed to establishing a culturally and intellectually diverse environment, encouraging all members of our learning community to reach their full potential. We are responsive to dual-career families and strongly promote work-life balance to support our community members through a suite of institutionalized policies. We are an NSF ADVANCE Institution and a member of the Ohio/Western Pennsylvania/West Virginia Higher Education Recruitment Consortium.”

V. The Role of the Affirmative Action Advocate

All members of a search committee are advocates for affirmative action. In addition, each committee must designate a member to act in the role of affirmative action advocate. In order to add value and ensure that all affirmative action issues are addressed, the roles and responsibilities of the advocate are outlined below.

Who should be in this role?

It is highly recommended that your Affirmative Action Advocate be a tenured faculty person and/or an individual with extensive experience on search committees and one who has shown commitment to affirmative action. Consider non-minority as well as minority individuals for this role.

1. Responsibilities of the Affirmative Action Advocate include:
   a. Evaluate the search process on a continuing basis, keeping in mind the goals and principles of affirmative action and diversity as defined by the university in its mission statement.
   b. Lead discussions with committee in identifying benefits of diversity and in developing a diverse pool that could lead to hiring a member of an underrepresented group for the department or administrative unit.
   c. Assist the committee in self-scrutiny about its own potential biases.
   d. Provide committee with department profile and hiring goals. Contact specific college and/or department designee for more information.
2. Bring process gaps to the attention of the search committee and/or the Chairperson for immediate action. Process gaps may include the following:
   a. Bias, prejudice or stereotyping in verbal or written communications, such as meetings, written correspondence, and interview questions;
   b. Inadequate representation of underutilized groups in pool of candidates;
   c. Bias, prejudice or stereotyping of candidates during evaluation period; and/or
   d. Giving little or no weight to the affirmative action goals of the university as a factor in the hiring process.

Communicating with Candidates

- Keep in mind that the way you interact with each candidate conveys a message about The Ohio State University community.
- Send an invitation to apply to all nominated persons.
- Ensure that all persons communicating information about the search have accurate knowledge regarding the search process, including legal guidelines for questioning candidates and references.
- Keep all applicants informed in a courteous and timely manner about the progress of the search. Inform applicants as soon as they are (definitely) eliminated, rather than waiting until the end of the search. If there is any doubt about appropriateness of eliminating and contacting selected candidates, consult with the Offices of Academic Affairs and Human Resources. It is important that efforts be made to ensure the remaining pool is diverse (race, color, sexual orientation, national origin, sex, age, disability, or veterans).
- Be prepared to answer questions about assistance for partners/spouses desiring employment.

3. Review all search committee activities to ensure that differences are cultivated and respected and that fairness is the norm. These activities include:
    a. Developing job descriptions and minimum qualifications to cast the widest possible net;
    b. Utilizing multiple and creative recruitment methods;
    c. Using criteria for evaluation that do not preclude persons with non-traditional career patterns or equivalent education and experience;
    d. Conducting interviews that are consistent and legal for all applicants;
    e. Facilitating campus visits that provide similar opportunities for each candidate;
    f. Developing a final slate of candidates that, whenever possible, gives the hiring official the opportunity to select from a diverse pool.

VI. Screening the Applicant Pool

The position has been posted. It is now time to begin reviewing the applicant pool. The first step in this process is to review resumes/CVs using the required and desired qualifications in the Position Description as your guide.

Identify the candidates that meet the qualifications: begin the screening process

1. Develop mechanism for screening applications, including record keeping to indicate why an applicant was screened out.
2. Review materials submitted by applicants; identify those who do and do not meet minimum qualifications.
3. Evaluate materials based upon established selection criteria, e.g., develop a matrix.
4. Determine persons to be phone screened
5. Critically review the selected group to ensure a diverse pool of interviewees, i.e., consider candidates with non-traditional training and experience.
6. If there is not appropriate representation of protected groups, consider methods to identify additional qualified candidates.
7. Once screens are complete, identify candidates for face to face interviews
8. Design form to track candidates at each step of the search process

Phase Two Tools

- Attachment 2a- Legal Considerations
- Attachment 2b- Diversity Recruitment Guide
- Attachment 2c- Affirmative Action Resources
- Attachment 2d- Phone Screen Template
- Attachment 2e- Applicant Screening Spreadsheet
- Attachment 2f- Candidate Presentation Template

Phase Three: Interviewing

This section of the search checklist should be completed in exact order before applications are received and reviewed, to eliminate bias toward any specific applicant.

I. Interview Structure

1. Identify all persons and groups to be involved in the interview process.
2. Review interview process with all interviewers, including:
    a. Relevant information about the position: position description, essential functions of the job, necessary areas of inquiry
    b. Responsibility for interview facilitation
    c. Responsibility to emphasize positive aspects of The Ohio State University (as candidates are interviewed, they are assessing The Ohio State University)
    d. Interview format and schedule
    e. Importance of consistency of questions for all candidates
    f. Confidentiality expectations
    g. Guidelines for Asking Questions During Search Processes
    h. Rating sheets and timeline
3. Carefully design interview process and campus visit to eliminate bias toward any candidate.
4. Develop interview format to include:
    a. Welcome
    b. Questions to be asked of the candidate
    c. Questions from the candidate to the committee
    d. Current status of the search process
    e. Closing
5. Develop questions that relate to the position based upon job description
6. Develop interview rating sheet and distribute to all interviewers
7. Consider having each candidate perform relevant job skills during the interview (such as teach a class, make a presentation)
8. Schedule and reserve meeting spaces for interviews, and communicate to interviewers
9. Confirm interviews and campus visits with letters, including an information packet with the following: position, department, an Ohio State University campus map, a Columbus map, and roster of the interviewing committee
10. Provide transportation to and from airport and hotel and an individual to escort the candidate to and from interviews
11. Conduct interviews
12. Collect and synthesize rating sheets for each candidate from all interviewers

II. Factors that Bias Interviews

Being aware of the following biases and their definitions can help evaluators avoid making snap judgments or inappropriate decisions.

1. First impressions - making decisions on this basis
2. Contrast effect - comparing applicant to the candidate previously before them
3. Negative information - weighing negative information higher than positive to screen out candidate
4. Halo/Horn effect - allowing one strong point that interviewer values highly to overshadow all other information; when this works in the candidate's favor it is the halo effect; when it works in the opposite direction, it is called the horn effect
5. Similar to me effect - rating those who are like the interviewer higher than those who are least like the interviewer
6. Cultural noise -failing to distinguish between responses of candidate that are socially acceptable rather than factual; candidate will give responses that are politically correct but not revealing
7. Affect bias - if the candidate appears to like the interviewer, then that interviewer rates the candidate higher
8. Physical characteristics - the more attractive the candidate is, the higher the score

III. Ways to Eliminate Bias

1. Set criteria in advance
2. Identify questions in advance; tie questions to criteria
3. Use the same interviewers during the process
4. Ask the same questions of all candidates
5. Develop a consistent interview agenda for all candidates, e.g., visiting areas of town, same opportunities for interactions
6. Educate interviewers on position, process and questions
7. Use standard rating sheets
8. Conduct reference checks consistently, and complete by the same person

IV.The Campus Visit

1. Provide opportunities for candidates to request meetings with particular individuals or university groups or local community
2. Ensure candidates are given equal opportunities to meet and interact with campus colleagues. Plan schedules that are similar in format to ensure an equitable basis for evaluation
3. Identify opportunities and organizations that could provide community and university resources for candidates

Notify candidates before proceeding to conduct reference checks

V. Reference Checks

1. Confirm with candidates that references will be checked
2. Develop questions to be asked of references
3. Develop procedures if references are not available or cannot be reached
4. Identify individuals to conduct reference checks
5. Identify approximate time frame of reference check (e.g., 20-30 minutes), to ensure equity and consistency of reference checks
6. Review Guidelines for Asking Questions During Search Processes with individuals who are checking references
7. Request letters of recommendation

VI. Evaluating the Candidates

1. If there is not appropriate representation of protected groups, consider methods to identify additional qualified candidates or re-open the process
2. Collect and review documentation from interviews, reference checks, and written materials relating the material to established criteria
3. Evaluate candidates' education and experience in relation to the requirements of the job

VII. Presenting the Pool of Candidates

1. Recommend finalists, including specific information regarding each candidate. When considering candidates who are comparably qualified, strongly regard affirmative action and diversity goals
2. Provide criteria used to evaluate and select finalists
3. Rank order finalists if asked to do so (eliminate – each candidate should be evaluated as "Recommend or Acceptable, Recommend or Acceptable with Reservations or Do Not Recommend or Not Acceptable)
4. Ensure that all committee opinions are expressed to the individual making the hiring decision
5. If a foreign national is among the final candidates, contact the Office of International Education for assistance in determining whether appropriate work authorization can be obtained

Phase Three Tools

- Attachment 3a- Visit In-Take Form
- Attachment 3b- Steps to Arranging Interviews
- Attachment 3c- Candidate Visit Planning Strategy
- Attachment 3d- Logistics Tracker
- Attachment 3e- Interview Itinerary Template
- Attachment 3f- Interview Feedback Form
- Attachment 3g- Reference Check Template

Phase Four
Offer & Disposition

Recruiter/HRP to prepare an offer for the final candidate

Recruiter/HRP presents candidate with offer

Upon successful background check the recruiter/HRP will disposition all other candidates

Phase Four- Offer & Disposition

I. During the search process, compensation is a critical recruitment tool but it is not the only tool. Search committees should consider the following when determining total compensation prior to extending an offer:

1. Internal equity: Consider the proposed compensation package of this position compared to other similar positions within the unit or throughout the campus;
2. External equity: Consider the proposed compensation package of this position to similar positions in the local, regional, or national market. Market data may be obtained through the Office of Human Resources, Consulting Services;
3. Experience: Consider the unique special skills or abilities the candidate promises to utilize in the job. Compare these skills and abilities against others in similar positions within the unit or throughout the campus;
4. Competitive benefit package: Remember that total compensation includes direct pay, the value of paid leave and the cost of benefits provided by the University. Total compensation and benefit information may be obtained through the Office of Human Resources, Consulting Services;
5. Training and career development opportunities available: Consider and provide to candidate information on training and development options that are additional to the employee fee authorization program;
6. Relocation expense options: Consider the flexibility of offering relocation dollars or other relocation options (see Office of Human Resources Policy and Procedure Manual section 2.30); and
7. Work / life issues: Consider benefits that assist in balancing work with other important life issues: flexible work schedules, job search assistance for partners, on-site childcare center, etc.

II. Terms of Offer

1. Compensation- refer to benchmarking done in Phase One
2. Relocation- Information and assistance provided by the Office of Human Resources Talent Acquisition team

III. Language in letters of offer may create a contract. Because of this, letters should not include the following:

1. References to permanent employment, termination for just cause, probationary periods, specific expectations of performance, or salary increases. A copy of the position description can be provided to the employee after acceptance of the position.
2. Specific causes for termination or dismissal.

*While the majority of hires prove to be satisfactory, there are instances where the employer-employee relationship must be terminated. Therefore, the letter of offer should not bind the university to a long-term, extensive relationship.

IV. Making the Offer (done by appropriate University administrator)

1. Negotiate compensation package within University guidelines
2. Secure a letter from the selected candidate indicating acceptance of the position

V. Dispositioning of unselected candidates

1. Notify non-selected candidates after the successful candidate has accepted the position

VI. Documenting the Search

1. Create and maintain a file for each applicant that includes the candidate tracking form, correspondence, materials submitted, and documentation that pertains to the candidate
2. Ensure that all files (electronic and paper) are kept in a secured manner
3. Keep summary of Search Committee meetings
4. Ensure that documentation provides rationale for Search Committee decisions and recommendations
5. Maintain records of the search process for three years

Phase Four Tools

- Attachment 4a- Offer Letter Templates
- Attachment 4b- Benefits Overview
- Attachment 4c- Relocation Information
- Attachment 4d- Relocation Allowances
- Attachment 4e- Background Check Information