Purpose:
This document is intended to compliment the Policy for Administrative Appointments. In all cases the Policy for Administrative Appointments takes precedence.

Management Searches: A general overview

The primary responsibility and initiative for launching a recruitment lies with the hiring manager. As the hiring manager, it is recommended that you convene the first session of the search committee, outlining the characteristics and responsibilities of the position, identify the required and preferred qualifications of candidates, and establish a deadline for the search committee to forward recommendations. A close and ongoing consultative relationship between the search committee and the appointing officer is encouraged.

As the hiring manager, one of the most important responsibilities you have is to staff your organization with the most qualified individuals in the job market. Consequently, you play a critical role in conducting an effective and successful selection process. A goal of the University is to hire the best-qualified candidates and fill positions in a timely manner. To achieve this goal we use an open employment system utilizing widely published postings that promote inclusive hiring. Throughout this process, you have a high degree of autonomy and thus more accountability.

Fundamental Principles

The University is firmly committed to the principles of Equal Employment Opportunity, Merit Principles and promises to employ “good faith” personnel practices in order to attract and retain a richly diverse workforce comprised of the most highly qualified staff and administrators to improve and strengthen the university.

Fresno State supports and adheres to state and federal legislation prohibiting discrimination in employment. Equal employment opportunity refers to the right of all persons to apply and be evaluated for employment opportunities without regard to age (over 40), color, disability, marital status, national origin, pregnancy, race, religion, gender, sexual orientation, or veteran status. Search committees are expected to work closely with Human Resources and the Equal Employment Opportunity (EEO) Designee to seek advice and assistance in developing proactive strategies to ensure each recruitment is based
on fair and open competition and equal opportunity. The recruitment process for staff and
administrative employees at Fresno State incorporates all federal and state regulations, CSU
collective bargaining agreements, CSU system policies, and University policies. Many
components of the recruitment process are mandated by these regulations and policies.

Therefore, California State University, Fresno is fully committed to the following merit
principles as they relate to employment practices:

- Recruitment should be from qualified individuals from appropriate sources in an
  endeavor to achieve a workforce representative of all segments of society.

- Selection and advancement should be determined solely on the basis of relative
  ability, knowledge and skills, after fair and open competition that assures equal
  opportunity is afforded all participants.

- All employees and applicants for employment should receive fair and equitable
  treatment in all aspects of personnel management without regard to, race, color,
  religion, national origin, sex, marital status, age, or handicapping condition, and
  with proper regard for their privacy and constitutional rights.

- Equal pay should be provided for work of equal value, with appropriate
  consideration of both national and local rates paid by employers in the private
  sector.

**Checklist for Management Searches**

The following checklist provides a summary of the many tasks associated with the
recruitment process.

- Determine need/ assess vacancy

- Review/ revise/ develop position description working with HR representative to
  ensure appropriate classification

- Develop a search plan- determine scope of search & parties to be involved in
  selection process

- Communicate search plan to HR Manager/ Recruiter and document search plan
  for incorporation into Nomination/ Justification for hire at the end of the overall
  selection process

- Gather recruitment materials (Hiring Manager action)
✓ Get Draft Vacancy Announcement and Position Description to HR electronically via Word Attachments (Hiring Manager or his designee action item)

✓ Send forward Recruitment Selection Summary Form to appropriate VP and Budget, then Employment Services (ES)

✓ Once the Recruitment Selection Summary Form is received in ES, the position will be added to Recruitment Log for Cabinet approval, once Cabinet approval is received and Vacancy Announcement has been finalized with Hiring Manager, then ....

✓ Post vacancy announcement for a minimum of 30 calendar days (HR action item) - and in accordance with established search plan parameters

✓ Decide who will chair your search committee and form search committee membership; communicate search committee membership names to HR Recruiter via email - clearly specifying committee chair and EEO Designee (Hiring Mgr. action item)

✓ Draft both application rating sheet (optional action - sample attached) and interview questions (sample questions can be provided upon request) - submit all to HR Recruiter at least 5 business days prior to use of forms in either committee screening meeting and/or any interview scheduled

✓ Track and acknowledge receipt of candidate materials (search committee action: optional)

✓ Screen and sort candidate materials (search committee action: required) [See sample application rating form attached]

✓ Schedule interviews, conduct phone interviews if necessary (search committee action: required) [See sample Interview Rating form attached]

✓ Conduct interviews, have external applicants who will have references checked complete and sign an employment application (search committee action: required)

✓ Verify degrees for all finalists. This may be accomplished by asking them to provide a copy or by contacting the issuing institution as reflected on their resume.

✓ Search committee refers top candidates to the hiring manager (ranked/unranked) - HR recommends unranked referral to hiring manager
✓ Check references (search committee member or hiring manager: required action)

✓ Make hiring determination (Hiring Manager action item)

✓ Establish a salary offer after obtaining advice from the Recruiter / HR Manager assigned to your recruitment and/or the Employment Services Manager (Hiring Manager action item)

✓ Complete the Recruitment Selection Summary Form and complete narrative — justifying final candidate nominated for hire— documenting in its entirety the search process from screening application through to candidate selected by hiring manager (Hiring Manager / Search Committee Chair combined action items) [See attached Justification forms]

✓ Forward the Recruitment Selection Summary Form, Justification, all applications, all notes, references, documents etc., associated with the search to Mike Dunn in Employment Services (ES) [Hiring Manager/Search Committee Chair combined action items]

✓ Once Nomination For Hire Form has been reviewed and signed by all and a salary is agreed to, as well as a start date, ON MPP POSTINGS ONLY — Hiring Manager can extend a job offer and obtain acceptance from candidate

✓ Hiring Manager notifies HR Recruiter/Manager - HR will contact candidate with final details and confirmation of job offer

✓ Send letters to all candidates notifying them of completion of search; notify internal (dept./ unit) candidates first (If non-“Administrative Appointment”, HR will notify all candidates, if meets the definition of “Administrative Appointment” as defined on G3.1, search committee responsible for notification letters.)

✓ Complete and process appointment paperwork (HR action item)

✓ Retain all search materials for 3 years after the search has been completed (HR action item)

A Good Faith Effort
Good faith efforts are specific actions that administrators, managers, and supervisors can take to ensure an appropriate broad based recruitment effort is undertaken to ensure well qualified applicants are recruited from among all segments of society. Taken as a whole, these good faith efforts represent the University’s commitment to equal opportunity, nondiscrimination, and excellence through diversity.
This is the time to decide who will chair the search committee. HR recommends that the Hiring Manager not serve on the search committee as usually s/he wants to maintain the final say for which candidate is nominated for hire. If s/he serves on the committee, s/he in theory has one equal vote as part of the committee. Please be aware that the administrator in charge of the unit or in some cases the appropriate Vice President will be required to approve any hiring action or decision. It is recommended that a point of contact be designated at this time to assist in the support functions associated with the coordination of a search.

Selection of the Equal Employment Opportunity Designee is equally important and should be completed at the earliest possible opportunity. The EEO Designee and the Search Committee Chair will work closely to ensure compliance with the university’s Equal Education and Employment Opportunity Plan. Both parties must certify the process before a nomination is submitted to the Hiring Manager. To obtain a list of approved EEO Designees, contact the EEO Coordinator in the Human Resources Office (278-5010) or visit the EEO web page: www.csufresno.edu/humres/EEO
Role and Responsibilities of the Search Committee Chair:

Normally, the first person to be selected for the Search Committee is the Chairperson, who is usually appointed by the head of the unit to which the selected person will report. The committee chair:

- Consults with the Recruiter and EEO Designee to review the search process, as needed.
- Schedules and directs all Search Committee meetings.
- Serves as a contact person, maintains all records associated with the search process.
- Provides application materials and related instruction to Search Committee members.
- Conducts or assists with reference checks.
- Serves as liaison between Search Committee members and candidates.
- Arranges travel accommodations for interviewees, if requested.
- Assesses and discusses with Department Head/Administrator any conflict of interest issues. For example, candidates may perceive an unfair process when a member of the Search Committee appears to be in a personal or business relationship with one of the candidates.
- Submits a list of two to five (preferably a minimum of three) unranked candidates to the Administrator or Department Head.
- Advises the appointing Administrator/Department Head of finalists' strengths and weaknesses.
- Maintains a record of all Search Committee meetings.
- Completes the Applicant Screening Record form for administrative review.
- Collects all records from committee members and forwards to the hiring Administrator/Department Head who retains such records for a minimum of three years.

The Role and Responsibility of Search Committee Membership
The Administrator/Department Head and the Search Committee Chairperson usually confer as to who will be represented on the Search Committee. The Search Committee members should have a legitimate interest in the selection process. For example, in the selection of a Recruiter, it might be advantageous to include a few of the primary recipients of the service provided by the Recruiter position. For administrative positions, persons who will be subordinates, peers, and/or superiors of the person selected should serve on the Search Committee. Where the dean of a college is being sought, it is customary to include subject matter specialists as well as prospective peers and supervisors. The composition of all Search Committees should be well balanced across gender and ethnicity. Generally, search committees are comprised of staff and faculty who have an interest in the function served by the position. However, on occasion, individuals outside of the university may serve on the Search Committee.

Search Committee members should not be related by kinship, personal relationships, or be engaged in business ventures with persons who apply for the vacant position. Persons who are known adversaries of applicants likewise should not be members of a Search Committee. It is incumbent upon a Search Committee member to disclose when such a conflict arises. Upon having knowledge of any conflict of issue potential, the committee Chairperson should discuss the matter with the Department Head/Administrator and take appropriate action.

**Committee Member's Responsibilities**

- Attends all meetings scheduled by the Chairperson.
- Assists in establishing a timetable.
- May assist with writing the vacancy announcement and determining media for distribution, when requested.
- Develops lists of interview and reference questions, if requested.
- Participates in all interview sessions.
- Calls references and former employers, when assigned by the chair, and reports findings to the committee.
- Evaluates applications according to education, experience, and other relevant criteria defined in the vacancy announcement.
- Assists the Chairperson with travel accommodations and interviewing schedules, if requested.
• Recommends from two to five (preferably a minimum of three) of the best-qualified candidates, unranked, to the employing Administrator/Department Head. The committee’s work usually ends with the recommendation to the Administrator/Department Head.

• Forwards all records to the Chairperson after the search.
Role and Responsibility of the EEO Designee:

EEO Designee's for staff positions serve on search committees as designees of the EEO Coordinator. Designees share the responsibility for ensuring that the Equal Employment and Educational Opportunity Plan (EEOP) is being adequately implemented. It is the responsibility of the hiring manager to appoint a designee to serve on the search committee. A list of approved EEO Designees may be obtained from the EEO Coordinator. (mdunn@csufresno.edu). A complete list of authorized EEO Designees can be found at www.csufresno.edu/humres/EEO. EEOD responsibilities are to:

- Be aware of the current composition by gender and ethnicity of the department conducting the search.
- Be aware of the summary of underutilization by occupational group cited in table 7 of the EEOP.
- Participate in the recruitment process from its initial stages to completion while keeping the coordinator, workplace equity program, informed as appropriate.
- Ensure that recruitment efforts are far-reaching and include efforts that attract qualified candidates from the broadest practical labor pool. An assessment shall be made to determine the extent to which recruitment efforts have been successful in attracting a diverse pool of candidates who are both qualified and truly competitive and render a decision as to the need to address any problems. Inform the EEO Coordinator as appropriate.
- Monitor the selection process at the search committee level, taking responsibility for assuring that all candidates are given fair consideration based on published criteria.
- Communicate problems or violations of university policy to the Affirmative Action Coordinator.

Preparing the Search Committee

The committee needs to meet at least by this stage of the recruitment process, if not before, to review:

- The charge of the committee.
- Role of the chair.
• Expectations of the chair and committee members.

• Orientation to the process.

• Timeline.

• Training by Human Resources and EEO Coordinator

At the first committee meeting, the hiring supervisor will:

• Charge the committee by discussing the position as it relates to the unit and division as a whole. Also, discuss the job criteria, including areas of emphasis and importance.

• Invite EEO and the designated Human Resources representative to present an overview of the process as well as answer questions.

The responsibility for documenting the selection normally rests with the committee chair. This documentation is a summary of the committee’s discussion and analysis of the most qualified person for the position. In the event that others participate in second interviews to make a final decision, it would be appropriate for them to provide input to the chair as part of the documentation process.

To ensure committee effectiveness, committee members need to:

• Assume personal responsibility for the outcome.

• Identify strongly with their role and responsibilities.

• Actively analyze and evaluate information, clarify ambiguous issues, clearly communicate, listen actively and express opinions.

• Be open-minded and develop a “filter” to ensure that personal or individual biases do not interfere with how a candidate is evaluated.

• Attend and participate in all meetings and interviews.

• Plan and schedule for the required time commitment.

• Commit to keeping all information about candidates and the process confidential (see below).

Conflict of Interest:
It is not appropriate for a person to serve on a search committee when a conflict of interest exists (i.e., spouse or close friend of committee member applying for position). Such a
conflict may require withdrawal from the search committee. Personnel policies of the university do not prohibit employment of more than one member of a family at Fresno State. However, no employee may vote, make recommendations, or in any way participate in decisions about any personnel matter, which may directly affect the selection, appointment, retention, tenure, compensation, promotion, termination, other employment status, or interest of a close relative. Close relative is defined as husband, wife, mother, father, son, daughter, sister, brother, and step-relatives or in-laws in the same relationship.

Committee members are reminded that their deliberations, as well as application materials, must be treated with the strictest adherence to confidentiality. Any information an individual has access to as a result of his/her status as a committee member is confidential. If confidentiality is not maintained, both during and after the recruitment process, it can lead to the cancellation of the search and/or a complaint being filed by a candidate. Confidentiality also becomes important when notifying candidates of their status upon completion of the search process. Candidates may want information about the qualifications of other candidates with whom they have competed. Remember the privacy rights of the individual candidates. It is recommended that you contact Human Resources for guidance prior to releasing information.

The Vacancy Announcement
After the recruitment packet materials have been completed and sent to Human Resources, the job description is classified. The Recruiter and Classifier work closely with the manager to ensure that the job description is accurate and includes all necessary components. The information submitted on essential job functions, specialized skills, physical requirements (if applicable), etc., provide Human Resources with the information needed to post a vacancy announcement and advertise the position. Carefully consider minimum qualifications, specialized skills required, and desirable qualifications. This section contains information the hiring manager and search committee will use to develop criteria for screening applications and preparing interview questions.

The Vacancy Announcement specifies the essential duties/responsibilities to be performed and the required/preferred qualifications as articulated in the Position Description. The hiring manager completes the Vacancy Announcement and the assigned Recruiter work directly with the contact person to ensure it is accurate and clear. The Vacancy Announcement form and detailed instructions can be found on the website, http://www.csufresno.edu/humres/forms.html. It is important to use the appropriate form based on the nature of the position: Management/Confidential, Classified, or Athletic Corporation positions. Templates for each style are provided electronically by staff in Employment Services.
Developing the Recruitment Plan

In order to demonstrate a good faith recruitment effort, the recruitment plan should include specific steps to ensure a broad recruitment effort is practiced. The following list of actions should be considered and, where appropriate, implemented in the recruitment planning and execution phase. (Note: the goal is to reach as many well qualified candidates, not grant illegal preference.)

- Review the EEO goals for the position and organizational policies relevant to recruitment procedures, particularly as it relates to recruiting and attracting a diverse pool of well-qualified applicants.

- Determine a strategic recruiting approach, which may be non-traditional in nature, to conduct a broad recruitment.

- Work with a diverse group of current staff to determine what information would be attractive and relevant to applicants.

- Provide opportunities for the recruits to gain a feel for the organizations and or the communities diversity and have materials prepared that will address life quality issues for the recruits, such as information on school systems, shopping, religious establishments, dry cleaners and hair establishments, and restaurants.

- Provide opportunities for the recruits to meet with members of the organization, including individuals who have common interests with the recruits.

- Provide a resource or contact list for applicants to allow for additional opportunities for them to discuss important issues/concerns. This may give them more latitude in seeking perspectives on their concerns (via e-mail, phone, etc.)

- If a potential new employee turns down an opportunity, ask for feedback regarding the reasons why the position was declined. This may help to revise recruiting practices to make them more effective.

Advertising the Vacancy

Positions may be advertised with a Closing Deadline; Priority Screening Date; or Open Until Filled. The latter two allow for maximum flexibility in hiring a diverse workforce. It is important for the hiring manager/committee chair to meet with Recruiter to discuss options that would best meet the needs of the position.
For all positions, advertising in metropolitan newspapers, specialized trade journals, web pages, etc., are paid by the recruiting organization. The cost of advertising in these and other publications can be costly but is worthwhile to increase outreach and for hard-to-fill positions. However, if poorly timed, the benefits can be severely diminished and ineffective. Therefore, it is critical for units to plan accordingly. Human Resources can assist with recommendations and quotes for these publications.

Minimum posting:
The Employment Services staff will list the minimum requirements for all job vacancies on the following:

- Job Opportunity bulletin board outside the Employment Office
- 24 hour Employment Hot Line recording: (559) 278-2360; (list of titles and reference to web page)
- Internet: http://www.csufresno.edu/humres/employment and on the CSU Job Listing Bulletin Board
- Cal Jobs www.caljobs.ca.gov
- America’s Job Bank www.ajb.dni.us
- Higher Ed Jobs www.higheredjobs.com (only those positions that are appropriate for a National search. E.g. Administrators, Academic Support positions, etc.)

A vacant bargaining unit position must be listed for a minimum of 14 calendar days and MPP positions must be listed for a minimum of 30 days. Although typically posted for at least 14 days, Athletic positions not part of the bargaining unit positions are posted according to University needs.

Commercial Advertisements:
Occasionally, you will want to advertise your vacancy in other commercial publications, radio or television. If so, consult with your Recruiter as early in the recruitment process as possible. The decision to advertise should be considered if your position has traditionally been hard to fill or the posting generates a small pool of candidates. You are encouraged to utilize the services of your Recruiter to help you decide where and how to place your ad and for what period of time. The college or department, not Human Resources, is responsible for funding commercial advertisements.

Included in your ad should be:

- An overall description of the basic functions and responsibilities of the position;
• A general description of your department (i.e. size, budget, reporting relationships (optional).

• A more specific explanation of the duties of the position and expectations of the candidate;

• Candidate selection criteria;

• Detailed information on how to apply for the position;

• A deadline date for application (if applicable);

• Equal Opportunity Employer / Non-Discrimination statement.

Human Resources will draft the advertisement. Unless a request is made to include specific details in the ad, a standard “simplified” ad is typically placed. This includes references and excerpts from the Position.

Documenting the Nomination
California and Federal law require that complete documentation of University hiring practices be maintained. Documentation should be maintained in Employment Services department for three years and then shredded.

If a hiring decision is challenged and DFEH or EEOC undertakes an investigation, the University will be required to provide documentation of the hiring process to address the charge. The documentation will be reviewed to determine if the hiring process used to fill the vacancy involved any discrimination practices. In addition, the organization may be required to provide the same information for all hiring decisions covering a period the DFEH and/or EEOC regards as appropriate.

Several examples of the methods and forms used to document the recruitment process are included.

What to Keep
Employment Services should develop and retain the following documentation in a position file, separate from the personnel file of the new employee:

• Copies of the Vacancy Announcement and all advertising

• Applicant Referral Documents and a copy of the Recruitment Selection Summary Form documents applicants who met minimum qualifications, who were interviewed, and who was selected for the position.
• Copies of all written correspondence with the applicants, including the official offer letter to the person hired

• All copies of the interview questions and the responses of each applicant interviewed

• Telephone reference contact forms

• Hiring Summary which is the written justification of selection/non-selection

• Any other information pertinent to the hiring process

When to Destroy Records
All records related to the hiring process should be promptly shredded at the conclusion of the three years records retention period.

**Sample documentation:**
Application Rating Matrix
This matrix is used to record individual committee ratings and the summary score. The committee then selects all candidates above a specified score for interview.

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<tr>
<th>Rater ---------&gt;</th>
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<th>Rater 2</th>
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APPLICATION RATING FORM
California State University Fresno

Confidential Information

Current Fresno State Employee?  NO____  YES____  UNKNOWN_______

NAME: ___________________  POSITION: ___________________

DEPARTMENT: ___________________  VACANCY NR.: ______

RATING KEY: Unsatisfactory  Marginal  Good  Very Good  Excellent

- Unsatisfactory: Fails to meet the minimum standard for this selection factor.
- Marginal: does not clearly meet the minimum standard for this selection factor.
- Good: Meets or somewhat exceeds the minimum standard for this selection factor.
- Very Good: Substantially above the minimum standard for this selection factor.
- Excellent: Far exceeds the minimum standard for this selection factor.

(Place (x) check mark in appropriate box for each selection factor)

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Overall Recommendation:
- () Fails to meet the required minimum qualifications for the position. Cannot be interviewed.
- () Meets all minimum qualifications however, few distinguishing qualifications. Others Better Qualified.
  Yes___/ No,
- () Meets all minimum qualifications, some distinguishing qualifications. Others Better Qualified.
  Yes___/ No,
- () Meets all minimum qualifications, several distinguishing qualifications. Others Better Qualified.
  Yes___/ No,

Reasons for recommendation/ rationale: ______
Rater: ____________________  Date: ________
Sample Narrative Statement and Nomination of Candidates

The following is a summary of the search committee deliberations and the process followed concerning vacancy no. ___ and classification _________ in the ____________ department.

The HR Manager provided the committee with ________ potential candidates.

In lieu of a formal Application Rating Sheet, the committee accepted all candidates designated to have met minimum qualifications. Each committee member individually reviewed all applications to determine their own recommendation of the top ___ candidates for interview. The full committee met on [date] to exchange viewpoints and build a group consensus on the top ______ candidates based on the following criteria.

Modify as appropriate. Examples might be qualify of experience, subject matter expertise, quality of education and/or specialized skills.

The applicant pool included _____ candidates that are currently employed by the University and met the definitions of article 9.2 of the current Collective Bargaining Agreement between the CSU Board of Trustees and the California School Employees Association (CSEA). Article 9.2 gives preference to qualified on-campus applicants. The committee found ____ of the ____ on-campus applicants to be fully qualified for this position.

The committee conducted interviews on [date]. All committee members and the EEO Designee were present. The EEOD was a non-voting member. A blank "Interview Sheet" for each interviewee was provided to the committee members. The purpose of the rating sheet was to aid in the collective review and rating of the candidates. Committee members used their interview notes to arrive at a consensus and formal recommendation based on a closer examination of the factors listed above. Person-by-person comparisons of those interviewed are provided below.

[Describe strengths and weaknesses of each candidate in alphabetical order. ]

References were checked on the top ______ candidates. [describe the results of the reference check]

The committee recommends the following ______ candidates for further interview and consideration by the [name of next level interviewer]:

List in alphabetical order

________________________   __________
Sample nomination memo by the selecting official pursuant to 2nd interview

From: [Hiring Manager]

To: Human Resources – Employment, Recruitment, Classification & Compensation

Three well-qualified candidates were referred to me, in an unranked order, for final interview and consideration. I conducted interviews with the three candidates on [date]. The purpose of this interview was to determine which candidate best fits the following definition:

The best qualified candidate will possess a thorough understanding of the legal and practical aspects of multiple Human Resource functions. The desired depth and breadth of functional knowledge will be derived from a combination of formal training and practical experience in the specialized field of recruitment and employment. The ideal candidate must have a clear vision for Human Resource management, as it relates to the employment and recruitment function, and a proven ability to support the complex demands of management and organized labor in a way that promotes positive labor relations. Finally, the best qualified candidate will demonstrate strong team building skills and advanced oral and written communication skills.

All three candidates were asked a series of questions and responded to a set of scenarios based on common issues associated with the Recruiter position. I found the following strengths and weakness attributable to the interviewing candidates.

Applicant name: describe the candidate in terms of his/her strengths and weakness when compared to those of the other candidates. What makes this candidate worthy of the nomination.

Alternate's name: Describe why this applicant, if any, is worthy of being offered the position. This offer would be only in the event the first choice declined the offer.

Having concluded the interview process, I am prepared to offer the position of [position] to [name of selectee] at a starting salary of not less than $[salary] but not more than $[salary].
Professional Reference Checking (All reference questions must be approved by your assigned Recruiter in advance.)

It is the responsibility of the hiring authority to conduct professional reference checks on the final candidates they are considering to hire. A search committee may also conduct reference checks during the search process, but it is still recommended that the hiring authority conduct their own reference checks before making the final decision. The time it takes to conduct reference checks is nominal compared to the time, cost and consequence of hiring the wrong person for the job.

An employer who fails to check references and hires a person with a history of physical abuse of co-workers or hires a person who is a registered sex offender to work with or around students can be charged with negligent hiring. The basic theory behind negligent hiring is that employers have a duty to protect workers, customers (students), and visitors from injury caused by such employees; this obligation exists even if the injury occurs miles from the work site.

PROCESS

The Management Application Information Form should be completed and signed by any candidate for whom a reference is sought. While the candidate is asked to provide the University with references, candidates should be informed that reference checking may be extended to their current and any or all of their previous employers, even though they may not be on their reference list. (Please be sensitive to coordinating the checking of the current employer’s reference with the candidate. We don’t want to jeopardize their current position.) If a candidate tells you not to contact a specific person or employer, you may not be able to honor that request if it is necessary to obtain a reference from that candidate’s current supervisor. The candidate should be informed of that up front before a reference is sought - the candidate does have at his or her discretion to remove his or her name from further consideration. The candidate is not required to provide prior authorization after he or she has signed the employment application, but checking references should be considered a very important part of the selection process and the hiring authority should be very cautious about hiring a new employee who will not provide adequate reference checking authorization. All references should be relevant to the position sought. If a person provided as a reference by the candidate does not have knowledge of the candidate’s ability to perform the tasks of the vacant position, then contacting that reference is of little use. The best references are, typically, former employers (supervisors/managers with direct knowledge of the candidates work), former co-workers, and former educators of the candidate.
INTERNAL CANDIDATES
Reference checks should also be done for internal candidates who do not work for you. You do not need an authorization form from the employee since we are already the employer. You should ask the same questions of the internal supervisor/manager as you would for the external candidate.

DO’S AND DON’TS

- Reference check questions should be directly related to the duties and performance of the person’s job. Do not contact “character references” or references who have not worked with the candidate.

- While the employer has the right to check employment references, both the United States and State of California Constitutions protect candidates and employees from unreasonable intrusions by prospective employers into their private, non-job related activities and status. (There are a few exemptions to this rule, for example, law enforcement candidates.)

- Questions related to protected class status or disability claims should be avoided. The rules are similar to those rules used in the interview process.

- For example, you should not ask about marital status, family status, residence, disability (physical or mental), non-professional organizational activities, economic status, arrest record, military service record, race, pregnancy status, child care provisions, color, religion, national origin, ancestry, gender, sexual orientation, ethnic background, age, etc. (See attached guideline.)

- Do not inquire if the candidate has ever filed a Federal EEOC and/or State Department Fair Employment And Housing (DFEH) or Workers’ Compensation complaint/claim. The filing of complaints/claims are considered a protected activity.

- If an employer starts to provide you information that is not legal or appropriate, please make every attempt to stop the flow of this information. If you find out information that you should not know, do not let it impact your decision-making.

Developing & Asking the Right Questions

Before making the first reference call, you should be prepared with a set of questions that are related to the position and valuable in helping you make a decision. Your Human Resources representative can assist you if you would like help in developing questions. At
the beginning of the conversation with the reference, it is often helpful for you to describe the position that the candidate has applied for and describe what you are looking for in the ideal candidate. This should assist the reference responder in framing their responses in a more meaningful way for you. When calling a reference, introduce yourself, state that you are checking the reference on (name), a candidate for (state the position and California State University, Fresno) and you have the candidate's permission and/or an authorization and release to talk with the reference. If they want to see the signed authorization and release form before responding, please make arrangements to fax or mail a copy to them. If they refuse to provide a reference, ask them what their policy is on providing references for current or past employees. Try to assess whether the issue is their blanket policy on providing references or the fact that they will not provide a reference for this particular employee (or former employee).

A Standard Approach
Questions regarding attitude, skills, experience and performance should be asked. For example:

- Did the candidate work under your supervision?
- During what time period did you supervise the candidate?
- Are you familiar with the candidate's former job? If yes, please describe the position the candidate held (or holds) in your organization. Review: a) duties, reporting relationships, scope of responsibility, level of autonomy; b) how long they were in the position and what other positions they held in the organization; c) confirm dates of employment, job title, salary and dates in current or last position. Always compare this information to what was provided on the application/supplemental questionnaire and/or resume.
- What were the candidate's strongest skill areas?
- Using a 1-5 scale, with 5 being high, how would you rate the candidate in the following areas:
  - List specific knowledge, skills, abilities, or tasks that are pertinent to your position.
  - Please describe how the candidate interacted in the workplace with: subordinates, peers, immediate supervisors and management (use each one that is appropriate for your position).
- Was the candidate a person whom you had to motivate or were they internally motivated?
- What aspects of candidate’s job did (he/she) do well? In what aspects of their job did they require a higher level of supervision or seem to struggle with?

- Describe the candidate’s quality and quantity of work.

- Did the candidate understand, follow and respect workplace rules and administrative processes (this could include dependability, attendance, punctuality, etc.)?

- Did the candidate demonstrate flexibility when appropriate?

- Please describe the professional areas that the candidate either struggles with or should continue to work on developing.

- Was the candidate a “team player”?

- California State University, Fresno is an organization that values diversity. How has the candidate demonstrated his/her commitment to diversity in your workplace? Please describe.

- Based on the description of the position that the candidate has applied for and reviewing their current or past job description, can you foresee any problems with the candidate being able to perform the duties of the position for which they have applied?

- Would you re-hire the candidate if given the opportunity?

- Is there anything else relevant to the candidate’s performance and attitude in your workplace of which I should be aware?

- Would you recommend the candidate for this position?

Supervisor/Manager Reference Questions:
- How long has the candidate been a supervisor/manager?

- Please describe the number and title of the employees that the candidate supervised directly.

- Please describe the number of people indirectly supervised by the candidate (number of people reporting through other supervisors to the candidate).

- Did the candidate do the following: (Clarify as to whether they had the authority and had actual experience in each of these areas.)
- Hiring
- Establishing job duties
- Recommending pay increases
- Evaluating
- Disciplining
- Firing
- Supervising/managing in an union environment
- Describe the candidate's supervisor/management/leadership style. (You should clarify and evaluate if it was an effective style.)

You should use the same basic questions for each reference for all of the candidates. If, in the course of responding to your questions, the reference refers or alludes to something not covered that is not in the prohibited or protected area of questions, please pursue that line of inquiry. Please note if you are only allowed to talk with the Personnel or Human Resources office for the reference information, your questions should be modified accordingly to fit into this situation. You may want to frame them around information found in the Personnel file such as performance evaluations, exit interviews, etc.

What to do with the information
What do you do with the information you have gathered? If you received conflicting references about a candidate, you may want to check further. Occasionally you may need to “throw out” a reference because of suspicion or knowledge of bias or unfairness of the reference provider. If you are satisfied that you have all the information to make a good hiring decision, proceed with your decision.

Confidentiality
Finally, if you guarantee confidentiality to the reference provider, you must honor that agreement. This includes inquiries made as to a candidate’s character or abilities during the course of employment. Access to that information by the affected employee or candidate can generally be restricted. If a candidate, an employee, the union, or any other person other than those in your chain of command or Human Resources requests the reference information, please contact Human Resources. Make sure that the information is stored confidentially, securely and not in the official Personnel file.

Establishing a Salary Offer
Level of pay for initial appointments is determined through the consideration of several factors including: 1) salary range established for the position, 2) specific skills and
experience required in the position, 3) level of skills, knowledge, abilities and previous experience attained, 4) difficulty in recruiting for the position, 5) equity with similar positions within the unit and 6) equity with external labor market salary rates.

Staff Positions
For initial appointment to a staff position, selected candidates are usually appointed within the first quartile of the salary range of the classification to which they are appointed. When it is necessary to appoint a candidate at a salary rate above the first quartile of the service salary range, the Dean/Director shall submit a written request to the Human Resources Department with justification relating to the factors listed above.

Within the first quartile of the salary range - the Dean/Director makes the determination

Within the second quartile of the service salary range - written justification by the Dean/Director, endorsement by the Compensation Manager and the Appropriate Vice President is required.

Within the third or fourth quartile of the service salary range or the performance range - written justification from the Dean/Director, endorsement by the Human Resources Director Manager and approval by the appropriate Vice President is required.

Management Personnel Plan Positions
Appointment salaries are commensurate with a candidate's experience and capabilities in relation to the hiring salary range established for the position within the broad administrative grade level (AGL). This range is established taking into consideration the salaries of comparable MPP positions at Fresno State and other CSU campuses, as well as external market considerations. Additionally, administrators must confirm that adequate funds are available in the division or department budget to cover the appointment salary.

While the salary of the previous incumbent may serve as a budgetary placeholder, it is NOT the best guide for determining an appropriate starting salary for a new employee. This decision is based on an analysis of that specific candidate's capabilities and qualifications in relation to the position requirements and other internal and external comparability considerations. Following are the considerations, guidelines and approval requirements for appointment salaries. The actual appointment salary must be approved prior to extending an offer.

Key factors to consider in establishing the hiring range and appointment salary:
An analysis of applicable market data for the position.

An assessment of the candidate's knowledge, skills and abilities against the overall requirements for the position.
An internal assessment of salaries of existing employees in comparable MPP positions.

An internal assessment of salaries in relation to employees supervised, especially those covered by collective bargaining agreements.

Actual budget funds available.

Salary guidelines for appointment offers
Hiring salaries will generally fall within the hiring range\(^1\) established for the position.

Hiring salaries that fall outside of the established hiring range, or that are higher than the identified market rate require additional documentation and justification including the following:

- Clear recruitment and retention issues as evidenced by difficult and prolonged recruitments and/or constant turnover in the position.
- The exceptional qualifications of a preferred candidate in relation to the applicant pool and position requirements.
- Prevention of substantial salary loss by the preferred candidate

**Offering the Position**

With exception of MPP positions, the Recruiter will make the job offer based on a final review of the selection process and appropriate documentation. However, in some cases the Vice Presidents are authorized to make job offers for key staff positions and Administrators. In either case, the offer should not be made until all approval authorities have signed the nomination form and consultation regarding appropriate salary has occurred.

Typically, making a job offer includes the following key steps.

- Formulate the salary offer with required justification statement.

- Obtain appropriate approvals (in accordance with college/unit procedures) to extend the offer.

\(^1\) A “Hiring Range” is a subset of the Salary Range. It is used to define the salary parameters based on the AGL as well as internal and external factors.
• Contact your department head or appropriate department representative to discuss the offer.

• Identify other aspects of the offer for discussion with the applicant, such as: start date, benefits, relocation allowance, etc.

• Contact the applicant and review the position responsibilities and expectations.

• Extend the offer verbally, cover such issues as the anticipated starting date; the starting salary; special working conditions and contingencies, such as passing a physical examination or obtaining a license or certification. If the position is a temporary appointment or is contingent upon grant funding, include that information in your offer.

• Follow-up in writing with a formal job offer that reiterates the oral offer and request written acceptance of the offer.