Recruitment Toolkit 2018/2019

Table of Contents

Human Resources Employment Contacts

Name & Contact Information	Contact for:
Team Leads Debi Jarvis dpjarvis@wm.edu HR Team Manager, Team Griffin Liz Robbins earobbins@wm.edu HR Team Manager, Team Wren	— Compensation Studies — Classification Reviews — Compensation Training and Policy Interpretation — Service Team Management — Position Descriptions
HR Employment Specialists Team Griffin Tabitha Pretlow trpretlow@wm.edu Team Wren Joy Payne jlpayne@wm.edu	— Recruitment & Selection — PeopleAdmin Support — Applicant Tracking — Temporary Agencies — Employment Process Guidance
HR Coordinators Team Griffin Stacee Webster slwebster@wm.edu Team Wren Jessica Bacon jhbacon@wm.edu	— Employee data requests — Personnel Action Form entries — EPAFs

Other issues, problems, questions?

Ron Starzman
Director of Employee Relations

John Poma
Chief Human Resources Officer

Click Here to Locate Your HR Service Team and Contacts

Overview

The Office of Human Resources strives to create and cultivate a campus community where William & Mary is recognized as both a great university and a great place to work, and that begins with the recruitment process. How we recruit and whom we hire directly influences how we are perceived, not only as a university, but also as an employer. This University Recruitment Toolkit is designed to equip you with tools, strategies, and best practices to help you attract, assess, select, and ultimately retain top talent that supports our mission.

This toolkit is structured in a sequential checklist format that follows the full recruitment lifecycle from start to finish, and it covers a wide range of topics that are both strategic and operational; roles of the hiring manager, how to use the HR platform in PeopleAdmin to update applicants' status, how to create an applicant evaluation grid for your search committee, templates for candidate communications, salary negotiation, and tips for onboarding are just some examples. All the valuable information that can help you direct and execute a successful search is included. For best results, follow the timelines and tips as closely as possible, and share this information with your interview panels and search committee members as needed.

Because of William & Mary's history and tradition of excellence, it is important that our hiring process reflect well upon the institution. As far as any one of our candidates is concerned, you are the sole brand ambassador of William & Mary – a very important role that should be taken seriously. Remember, you will interact with significantly more people than you will actually hire, and for many of them, your interaction will be their first and only interaction with our university. How we represent the university affects our brand as an employer and as an institution of higher education, so every candidate interaction should be positive. Every applicant should be left with a favorable impression of William & Mary, regardless of your interest in the person as a candidate. Someone you disqualify now might later become an excellent candidate for a future role at William & Mary in another division or department. If you leave a positive impression of the university with each applicant, that person will be encouraged to continue to apply for future roles.

As you navigate this toolkit, a consistent theme is the need to structure effective communications. Promoting consistent candidate management, as well as effective communication, is critical and often overlooked. The need for excellent communication holds true for all stakeholders, internal and external applicants, candidates, members of the search committee, members of the interview panel, and any other related parties. We recommend that applicants should have one singular point of contact throughout the life of the search and interview process. Ideally, the search committee chairperson, or his or her designee, should serve as this primary point of contact. The point of contact is responsible for making sure communication is smooth, timely, accurate, and equitable among all applicants in all stages of the process.

Hiring is one of the most important things that we do – because with each new hire we are shaping the future of William & Mary. While we hope you find this toolkit useful, please remember that every search is unique and no two candidates are alike. Along those lines, a list of your Human Resources team contacts is included above, and we encourage you to contact us anytime that we can provide support or assistance.

Stage One – Before You Hire

Create or Update the Position Description
Determine Recruitment Options
Review Affirmative Action Goals
Reasonable Accommodations for Applicants
Determine Search Committee Roles & Responsibilities
Create a Recruitment Timeline
Ethical Hiring Practices, Confidentiality, and Biases

Create or Update the Position Description

Before you initiate recruitment for any position, it is imperative that you have a position description that is updated and accurately captures the minimum and preferred requirements for a candidate to be successful in role. We encourage you at this stage to review departmental needs and priorities and consider how the needs of the position may have changed, and how you see the position fitting into the longer term strategic goals of the department or unit. The more thought put into this process on the front end, the easier your search and selection process will be on the back end. A position description is a critical component of the search process. It both defines the core responsibilities for the position and establishes performance expectations.

Remember that all requirements included in position descriptions should contain objective measurements. For example, "experience supervising employees in a higher education setting" is much better than "significant management experience", because it is easier for us to measure if a candidate does or does not meet this requirement.

When addressing preferred experience in the position description, we suggest you use the suggested list of modifiers below rather than referring just to specific years of experience:

• 	Knowledge of ___, which is typically 1 year of experience and/or training
• 	Working knowledge of _____, which is typically 1 to 3 years of relevant experience and/or training
• 	Significant experience, which is typically 4 to 8 years of relevant experience and/or training
• 	Extensive experience, which is typically 8 years or more of relevant experience and/or training

As you are creating your requirements, ask yourself why each requirement is important. If it is likely that it will be difficult to ascertain a job requirement from the application or resume, you may want to consider including a supplemental question as a part of the application process or an interview question. A supplemental question can be an effective tool for assessing whether an applicant meets minimum qualifications.

Without a comprehensive and accurate position description, you risk hiring a candidate that may not be able to meet or exceed the requirements and expectations of the position. So again, before you recruit, be sure your position description is updated and accurate.

If you have a current accurate and approved position description, you are ready to move forward and proceed to the next step. The position will not have to go through a class and compensation review.

If you do not have a position description and need to create a new one:

➲ Click the link here for instructions on how to [Create a New Description for Staff or Professional Positions](#)

➲ Click the link here for instructions on how to [Create a New Description for Instructional or Executive Positions](#)

If you have a position description but need to update or edit it:

➲ Click the link here for instructions on how to [Update/Reclassify an Existing Position](#)

If you have position description questions, please contact askhr@wm.edu.   If you have questions about organizational structure and design, please contact the Director of Employee Relations.

Determine Recruitment Options

Once the position description is complete, your HR employment specialist will contact you to request the following information that will be necessary to post your position for recruitment:

- What recruitment option best fits departmental needs? Two recruitment options are available:
    - ❖ University Internal Recruitment – only current employees may apply (i.e. hourly, classified, and university employees)
    - ❖ Open Recruitment – All employees and the general public may apply

This decision should be based on factors such as the diversity of the university's workforce and the availability of qualified applicants.

In addition, your HR employment specialist will need to know:

- How long will the position remain open (e.g., until filled or to close on a specific date)? If open until filled, the posting should indicate when the review of applications will begin.
- What salary range, if any, is to be listed on the posting. It is important to set salary expectations early in the process. The pay bands are very broad, so just saying "salary commensurate with experience" prompts qualified applicants to think they should be near the upper end of the band. We suggest language such as "We anticipate paying in the $__k range, depending on experience." It is important to obtain a pool of applicants who know what to expect with regard to salary and who are willing to accept a position in the budgeted salary range of the position.

- ❖ NOTE: If you do not use the suggested language above and advertise a fixed salary range, any subsequent offer must fall within the posted advertised range. You cannot make an offer of a salary that is greater than the salary range in the job posting.
  - ❖ If your department wishes to offer a salary rate not within the fixed posted salary hiring range, the position must be reposted for a minimum of five days to note the revised hiring range.
- Will the position be posted outside of the W&M employment website (i.e., professional websites, listservs, etc.)? If so, what are name of these websites/listservs?
- Will the posting include any supplemental questions. These questions can be helpful to screen applications on specific points of experience, education, etc.   Supplemental questions are not required.
- Will applicants be required to submit any attachments other than their resume and cover letter to their application (i.e., writing samples, portfolios, etc.)?
- Who will serve on the search panel? Please provide names, titles, and e-mail addresses of all panel members.

After you speak with your HR employment specialist, you will receive an email reminding you:

- The screening process is one of the most important functions of a successful hiring official.
- Through the selection of employees you determine the strength of your most important resource, the people who work within your organization.
- Applicants must be evaluated on the basis of the knowledge, skills, and abilities required to perform the job.
- Selection criteria must be established and applied consistently.
- The qualifications indicated in the job description that can be evaluated by reviewing the application materials are the only criteria used to qualify the applicant pool.
- In an effort to assist the university with ensuring an efficient and competitive hiring process, screening grids should be submitted to Human Resources for intital approval. The completed grid must then be submitted again prior to contacting applicants to schedule interviews.

Once the position is approved for posting, positions must be posted to the William & Mary jobs site at jobs.wm.edu. There is a mandatory posting period of 7 calendar days for each positon; however, as a best practice, the recommended posting period in order to achieve a qualified candidate pool is a minimum of (14) calendar days for professional positions and a minimum of (10) calendar days for operational positions. If a qualified candidate pool is not obtained, HR may require that the posting timeline be extended. You also have the option of posting positions as "open until filled" – which is a good strategy in cases where you do not expect a robust candidate pool. In cases where positions are listed as "open until filled", we recommend that you set a target candidate review date not later than 14 days from posting. In addition to the W&M Jobs website, all positions are also automatically posted on the Inside Higher Ed jobs page as well as jobs.virginia.gov

For some positions, our standard posting process will be enough to attract a comprehensive and diverse pool of qualified applicants. For other positions, it will not be nearly enough. Depending on the position, the specialization, talent available, the geography, and many other factors, you may consider advertising in specific journals or industry publications.   A list of these resources can be found on the Office of Diversity and Equal Opportunity website. Ad placement and payment is the responsibility of your hiring department. You

should work with your HR employment specialist to determine a posting strategy that is most appropriate for your position and department.

You are also encouraged to utilize professional connections/listservs, online professional networking websites (such as LinkedIn), and professional associations to proactively invite qualified individuals to apply for an open position. Please remember that once an individual has submitted his/her application online, regardless of the nature of your relationship or prior working experience, s/he must be consistently treated in a similar manner as all other applicants in similar same stages of the process, each step of the way. We cannot show preferential treatment, or give any single candidate an advantage over others (for example, coaching them for their interview process). Remember that the William & Mary Code of Ethics prohibits conflicts of interest as well as the appearance of conflicts of interest.

Sample Communications: **Proactive Recruiting**

Dear [NAME],

I wanted to share with you a [JOB TITLE] opportunity that we are currently recruiting for on my team at William & Mary in the event you or anyone in your network might be interested or available. The position is a great opportunity to [DESCRIBE POSITION ADVANTAGES] and we are looking for someone with an interest/ability to [DESCRIBE KEY ATTRIBUTE].

A full position description, as well as information on how to apply, can be found on our website here [INSERT LINK]. Please contact me if you or anyone in your network might be interested. I would be happy to provide any information or answer any questions about the role. Thanks in advance!

Review Affirmative Action Goals

Before a job is posted, the hiring manager should determine if the position being filled is subject to an affirmative action goal. The university breaks its jobs into groups, collecting together jobs with similar duties and responsibilities and pay. Placement goals are set for job groups that have fewer minorities, veterans, persons with disabilities or women than expected, based on the availability analysis. A Placement goal is a target or objective designed to be reasonably attainable through good faith efforts. The university also measures its progress towards equal employment by tracking its success in achieving placement goals.

- Placement goals are not quotas, nor are they floors or ceilings for hiring.
- Placement goals do not justify preferences based on sex, gender, race, or any other protected characteristic.
- Hiring remains based on merit, and Placement goals do not require the university to hire an unqualified person or to hire a less qualified person in preference for a more-qualified person.

If a position is subject to a Placement goal, the hiring manager must work with the HR employment specialist to provide guidance and support on conducting an inclusive search and selection process. This process should include consideration of placement of job advertisements with organizations or listservs

serving underrepresented populations. For more information about Diversity & Inclusion at William & Mary, click here.

Reasonable Accommodations for Applicants

As stated in the Employee Reasonable Accommodation Policy and Procedure, applicants may also request accommodations in the hiring process or application itself – such as a modification in the manner in which an application is filed. Applicants are responsible for making specific requests so that the university can provide reasonable accommodations; you should not ask applicants whether they have a disability or need an accommodation unless the applicant indicates that he or she needs an accommodation.

Applicants must make these requests in advance. The university will not make retroactive accommodations. Applicant requests for reasonable accommodations in the hiring process may be made to the hiring supervisor, human resources personnel, or the Office of Diversity & Inclusion. Any supervisor or other person receiving the request for accommodation must contact the Office of Diversity & Inclusion for guidance.

Determine Search Committee Roles & Responsibilities

Once the job is posted, the search committee roles and responsibilities should be defined. The supervisor, or hiring manager, for the open position usually act as both the search committee chair (SCC) and hiring official. The SCC owns all aspects of candidate communication and engagement. As discussed in more detail throughout this guide, it is important to keep lines of communication open with all applicants throughout the process. In cases where the supervisor is not able to lead the search for any reason, s/he should appoint a peer or direct report to function as the SCC in his/her place.

Search Committee Chairperson

Not every search requires a search committee; however, we generally suggest that at least two people from a department or unit interview and select a candidate. If a search committee is necessary, the search committee chair (SCC) appoints search committee members and oversees and leads the search committee. This includes directing evaluation and selection of applicants throughout the full recruitment lifecycle.

When choosing an effective search committee, a SCC should select a blend of colleagues who are best positioned to assess and measure candidate skills and attributes against those stated in the position description. The SCC has final decision making responsibility for search outcomes, though all decisions should be based on feedback from the entire search committee.

Hiring Official

The Hiring Official is responsible for all administrative aspects of the search, as well as all aspects of candidate communication and engagement. For example, the Hiring Official is responsible for the People Admin applicant tracking system. In some cases depending on department structure and needs, a Search Committee Chair may delegate authority to a departmental HR Liaison to function as the hiring official.

Search Committee Member

The search committee chairperson selects each of the search committee members. The search committee members provide support, expertise, and guidance during the selection process. A search committee member can be a department member who will work closely with the individual or an external stakeholder who will work with, or rely on, the work of the new hire. In each case, the committee members should be able to assess the potential applicant against the qualifications and duties described in the position description. The more diverse the committee is, the better. Involving colleagues and peers from other areas is a good opportunity for collaboration across teams, and doing so can help foster a deeper appreciation and shared understanding of your unit or department's perspectives.

The search committee chairperson should meet with the search committee members at the beginning of the search to discuss search priorities and to agree on the skills and experience that will make the new hire most successful. The search committee members and the hiring manger should agree on and add any important requirements not listed in the position description at their initial meeting.

When a search committee is warranted, most search committees consist of 3-6 persons, depending on the nature of the position.

Create a Recruitment Timeline

In the interest of efficiency, the recruitment timeline should be as short as logistically possible. Remember that the best candidates have a short shelf life, and the longer you extend a search, the more likely you are to miss out on a great candidate.

It is important to discuss the projected search timeline with your search committee as soon as the position is posted. If an individual has a time or scheduling conflict he or she should not be asked to serve on the search committee. Sitting on a search committee is an important time commitment and the success of the search is directly proportional to the effort invested by each of the search committee members. It is much easier to manage expectations and determine a search committee member replacement at an early stage of the search.

When establishing a recruitment timeline, it is important to remember some of the common pitfalls that can cost you a desirable candidate:

- Poor or inaccurate communication
- Untimely communication
- Lack of transparency about the search timeline
- Frequent changes in the search or interview timeline
- Drawn out search timeline
- Inability to answer candidate's questions

Sample Communications to search committee members: **Creating a Timeline**

Thank you for agreeing to participate in the search for _____. Beginning on DATE, we will begin reviewing and discussing candidates. Below is the timeline for the search --please let me know about any conflicts.

- *By DATE, please take some time to review candidates then use the attached skills grid to evaluate the candidate application materials.*

- *By DATE, please respond to this email with your availability for phone interviews on DATE/TIME. Based on this response, will set-up a schedule for phone screens.*

- *By DATE, please send me a list of your top 5-7 candidates (based on the skills grid/rubric). Include your candidate review summary in the Excel sheet so I can easily consolidate the data prior to our meeting.*

You will have to access the university's HR system PeopleAdmin. You should have received an email with instructions for accessing the system: https://jobs.wm.edu/hr/sessions/new. If not, please let me know.

Thank you again for your willingness to support this search. We look forward to seeing everyone at our search meeting on the DATE.

Complete Safe Hiring Training

All search committee members are required to complete safe hire training every two years. In addition to search committee members, we strongly recommend that any individual who serves on an interview panel also complete this important training. The Safe Hire program addresses strategies to avoid hiring practices that are unsafe, illegal, or just not appropriate.

The fastest way to access Safe Hire Training is by viewing the narrated video presentation which you can access by clicking the link below. You can also request this presentation be provided to your entire Search Committee or Interview Panel by your HR employment specialist.

➲ Access Safe Hire Training through William & Mary's cornerstone online learning management system here

➲ If you do not have access to Cornerstone, you can access the training here: Safe Hire Training

As a public university, we have established expectations of transparency in all aspects of the recruitment process.   We must provide candidates with information that is both accurate and realistic. This ensures that potential new hires can make employment decisions based on the best information possible. Keep the following ideas in mind when communicating with applicants:

- Be candid and truthful in responses and statements to candidates
- Truthful statements will lead to deeper and more meaningful interview and selection processes
- Transparency about the position will give candidates the opportunity to make an informed decision about taking or not taking the job, if it is ultimately offered to him or her
- Transparency is a two way street. The more honest and transparent we are as a university, the more open and honest our candidates will be with us

All parties involved in any search process must uphold the highest levels of confidentiality. Except as required by law, information about applicants and their background or work history should not be disclosed to any parties outside of the university, or to any to any parties inside the university who are not directly involved in the search process. Under no circumstances should anyone release the name of an applicant or information about the applicant without the applicant's consent. Should you have questions about this policy, please contact the Office of Human Resources.

William & Mary is committed to providing an environment for its students, employees (including applicants for employment) that is free from discrimination based on any personal factor unrelated to qualifications or performance such as, without limitation, race or color, national origin or ethnicity, religion or creed, political affiliation or belief, age, sex or sexual orientation, gender identity or expression, disability, marital status, pregnancy status, height, weight, veteran status, caretaker status, or family medical or genetic information. Important research from the neuro-social and cognitive sciences show that as well intentioned as an organization may be, hidden biases may influence the ways in which we see and treat others, even when we are determined to be fair and objective.

Implicit Biases

Unconscious biases, also called hidden biases or implicit biases, unconsciously influence all of us, even if we are well-intentioned. Implicit biases are attitudes or stereotypes that affect our understanding, actions, and decisions in an unconscious manner. Our implicit biases are the result of mental associations that have formed by the direct and indirect messaging we receive, often about different groups of people. When we are constantly exposed to certain identity groups being paired with certain characteristics, we can begin to automatically and unconsciously associate the identity with the characteristics, whether or not that association aligns with reality. Implicit bias is a product of our unconscious and automatic thinking. We act on our implicit biases without awareness; thus, they can produce behavior that diverges from someone's endorsed principles and beliefs. While completely erasing or eliminating biases is extremely difficult, there are steps you can take to diminish the effects these ideas have on your ultimate hiring decisions. The most

important step to eliminating a bias is acknowledge that you have biases. By doing this, you may start to make concerted efforts to minimize the influence of these biases.

Why Implicit Biases Matter

Implicit bias matters because everyone possesses these unconscious associations, and implicit bias affects our decisions, behaviors, and interactions with others. Although implicit biases can be positive or negative, both can have harmful effects when they influence our decision making. Understanding implicit bias is also important because of its connection to structural inequality.

What Can I Do About It?

Having biases doesn't make you a bad person – it only makes you human. Fortunately, our implicit biases are not permanent; they can be changed. Take these steps to challenge your unconscious beliefs.

1. Educate Yourself
   Take the Implicit Association Test (IAT) at implicit.harvard.edu to learn of your unconscious beliefs. Study history and look for the connections between the past and current realities of inequality.
2. Take Actions
   Seek people who run counter to stereotypic views, increase contact with groups of people outside of your own demographics, and try to think of things from the perspective of others.
3. Be Accountable
   When confronted with bias, take the time to examine your actions or beliefs. Thinking of how you would try to justify them to other people can help you change and be more aware.

What Are Types of Implicit Biases?

Be mindful of the ways that biases can influence decision-making, so that you can avoid them. The following are examples of different types of biases:

- Stereotyping – Whether because of anecdotal evidence, portrayals in media, or other subconscious impressions from early childhood, stereotyping can threaten impartiality by influencing you to group certain types of people together, or to make assumptions about groups based on their race, gender, appearance, or other personal characteristic.
- Halo Effect – Can happen when an applicant has some particular characteristic that overshadows the interview, and makes the interviewer automatically associate him or her with other good or bad qualities. The halo effect, for example, might occur if an applicant has a William & Mary degree; this might encourage the interviewer to automatically assume the person is very qualified even though that might not be the case.
- Pitchfork Effect – The opposite of the Halo effect, the pitchfork effect happens when an interviewer has a negative association with a candidate characteristic and automatically assumes the person is not qualified based on that irrelevant factor.

- Nonverbal Bias – This occurs when the interviewer makes an evaluation of someone based upon his or her body language, personal appearance, or style of dress.
- Affinity Bias – This occurs when an interviewer identifies non-work related similarities, and as a result, the interviewer makes a decision because of those similarities. An example might occur if an applicant gets preferential treatment because the person comes from your same hometown, or have the same shared interest. This can be a particularly challenging bias to recognize. Interviewers should always focus the interview on objective search criteria and try to minimize the effect of any personal affinity for the applicant.
- Prototype Bias – This occurs when hiring managers and interviewers routinely look to a similar type of person for a certain type of position. For example, "Tina was great so let's hire another Tina". Interviewers should remain open-minded and not pigeon-hole, or prototype, certain types of people to specific roles.

It is critical that each search committee member is aware and cognizant of implicit biases in the recruitment process. The search committee should, therefore, develop a strategy and determine metrics for evaluating candidates to guard against the influence of implicit biases. As discussed more fully below, each hiring official must have objective and specific criteria in each phase of the search against which to evaluate an applicant. It is important for search committees to:

- Not base decisions on first impressions
- Test conclusions about each candidate
- Increase self-awareness of the committee's own hidden biases
- Make hiring decisions based only on the objective data included in the position description

➲ Click here for the Kirwan Institute 2016 Report on Implicit Bias

Stage Two – Reviewing Applicants

Working Together as a Search Committee
Create a Screening Grid
Contacting Candidates Selected for Initial Screening
Conducting an Effective Screen
Managing your Applicants in People Admin
Disqualifying Applicants not under consideration

Working together as a Search Committee

Each search is unique, and the recruitment strategy for each search should be based on the needs of that particular position. However, at the simplest level, there are certain steps in the search process that are the same for all searches. Each search begins with a preliminary candidate screen, and it should end with an in-person interview. If you plan effectively, most searches can be completed in this two-step process.

Regardless of what recruitment strategy you determine, at the end of each round, the search committee should meet to evaluate and separate applicants into groups based on their relative competitive ranking. As always, all members of each competitive ranking group must be treated the same and given the same considerations. The goal for the screening process is to determine which candidates will advance, which candidates will serve as alternates, and which candidates will not advance.

Create a Screening Grid

Once the application period has closed, it is time to begin the screening process. The SCC or search committee members should first review the applicant pool to determine if the applicants meet the required minimum qualifications. If an applicant does not meet the minimum required qualifications, he or she cannot continue in the process or be offered the position. You do not need to include applicants on the screening grid who do not meet minimum required qualifications.

After screening for minimum required qualifications, it is time to create the grid. The screening grid, sometimes referred to as a rubric, is the basis by which applicants are selected for an initial phone or in-person screening.

Typically, the screening grid is a MicrosoftExcel spreadsheet. PeopleAdmin, which serves as the university's applicant tracking system, can be used to download anExcel screening grid template incorporating the required and preferred skills and education from the position description. You should use this template as a guide or reference to create the rubric. It is a starting point only. One of the common errors at this point in the search process is to include all of the required and preferred skills from the position description on the resume screening grid. The rubric should only contain metrics that can be determined from the resume. If it is not

possible to determine from the resume whether the applicants have a particular skill, it should not be included in the rubric, or the metric should be revised. For example, the position description might indicate that the candidate must possess excellent oral communication skills.   In this case, it is not possible to rate the oral communication skills of the person from the resume if there has been no communication with the applicant. Instead, the rubric might include, for instance, a metric that asks whether public speaking experience was a component of the applicant's prior employment history.

If you need assistance or have questions about how to create an effective grid, you should contact your HR employment specialist. Once the grid is finalized, each committee member should fill it out for all candidates as a means to determine committee consensus, and the final version should be sent to your employment specialist. **You may not contact any candidates until HR provides approval to do so**.

Each of the metrics in the grid does not have to use the same rating scale. For example, with respect to preferred educational requirements or certifications, it might be a binary scale. Either the applicant meets the requirement or does not. So, for example, if the preferred educational requirement is a Master's degree, the applicant receives a 1 in that particular field if the person has a degree or a 0 in that field if he or she does not. With respect to other required or preferred qualifications, a 3 point scale might be more appropriate. The scale could be:

- 1 – limited experience (less than five years)
- 2 – moderate experience (5 to 10 years)
- 3 – extensive experience (more than 10 years)

If you feel you are not able to make an accurate determination based on the candidate's application materials, keep the section blank.

Note: In accordance with the Code of Virginia, which requires that state agencies give preference in the hiring process to veterans, and in support of Executive Order 29 (2010), W&M takes veteran status into account as part of the candidate applicant and assessment process, and as such must be included on the screening grid. If you are using an Excel template, be sure to include veteran status as a category. We recommend that you download the screening grid from PeopleAdmin, as it will automatically include veteran status as a column. See the link below for information on how to properly score applicants who answer "yes" to veteran questions.

➲ Click here for more information on [Treatment and Verification of Veteran Status Related Questions](#)

Application Screening Grid																		Experience Key	
Position Title *and* Recruitment #:																		5 = Extensive Experience (10+ Years)	
Department:																		3 = Moderate Experience (5-10 Years)	
Reviewer's Name *and* Signature:																		1 = Limited Experience (1-5 Years)	
Date:																		0 = Little to No Experience (<1 Year)	

	REQUIRED											PREFERRED					
Applicant's Name	Degree	Exp. In leadership role in Employee Relations	Knowledge of applicable Local State and Federal laws and regulations, especially related to employment and employee relations	Conflict resolution, mediation and/or arbitration process skills	Administration of Performance Management	Presentation experience	Excellent organizational with superior communication skills (both verbal and written)	Knowledge of progressive discipline systems	Total Required Score	MS/JD	Banner and Cornerstone	VA Grievance Procedure	Certifications i.e., SHRM, PHR, IMPA	Veteran	Total Pref Score	TOTAL SCORE	Comments

➲ Click the link here for more instructions on [How to Complete a Skills Grid](#)

Contacting Candidates Selected for Initial Screening

Once the search committee has made initial determinations regarding which candidates will and will not be selected for initial screening, it is helpful to let your employment specialist know that you have begun to move applicants through the candidate workflow. By this point, you should have already sent a copy of your screening grid to your HR employment specialist for approval.

While initial screenings are commonly conducted via telephone, in other situations as schedules and circumstances permit, in-person screenings or video screenings (via Skype, Google Hangout Video Chat, Zoom, or other video platforms) are encouraged.

Best practices for initial screenings:

- Leave sufficient blocks of time between phone screens to allow for some shifting of time schedules.
- To get an accurate and equitable assessment of all candidates, it is recommended that the committee conduct all screenings via the same platform (do not phone screen one group of candidates and in-person screen others).
- Prepare screening questions in advance, and be sure to ask the same questions of each candidate so as to get consistent feedback. A best practice is to assign one question to each search committee member and have that member ask the same question of each candidate.

- Take notes and keep them. Your recruitment records <u>must be kept for compliance purposes</u> for a period of three years, and as public record they can be audited.   Keep your interview notes in one central location, and do not write anything on resumes or screening grids.
- Create an interview evaluation or assessment form so that there is an objective and consistent basis for advancing applicants to the next stage. (See Appendix below for examples of interview evaluation forms that you might consider using)
- Consult your Employment Specialist if you need help preparing your candidate questions.

Sample Communications: **Initial Screening Invitation (via phone)**

Hello. . .

My name is [NAME] and I am the Search Committee Chairperson (or Hiring Official) for the POSITION TITLE in the DEPARTMENT at William & Mary.

The search committee has completed its initial review of applicants, and based on our review we would like to invite you for a TELEPHONE/VIDEO/INPERSON interview.

We have interview windows open at the following times [TIMES/DATES]. Can you provide your availability for one of these thirty-minute windows?

Thank you for your interest in the position – we look forward to speaking with you.

Conducting an Effective Screen

The goal of the screening process is to determine a list of candidates that *will be selected for in-person interviews*. The goal is NOT to figure out which candidate will be hired. Preliminary assessments are designed to provide you with more insight into the candidates' background and experiences. The initial screen is not intended to be as detailed as a comprehensive in-person interview. On average, initial screens can take anywhere 15-30 minutes. If your screens are taking longer than one hour, you are most likely going into too much detail. If so, you should consider revising your strategy to postpone questions that would be better reserved for the in-person interview process.

Always allot 5-10 minutes at the end of your screening schedule for the candidate to ask questions. You are an ambassador of William & Mary, and your role in each step of the interview process is to make sure each candidate is equipped with enough information about the role and the university to determine if he or she is interested in moving forward with W&M as an employer (this will be discussed more in Step 4). Hiring your best candidate begins with this first candidate conversation. Do not automatically assume that every candidate will accept an offer – that is why the process is called "recruiting" and not "hiring".

Click the link here for a list of Sample Screening questions

Managing your Applicants in PeopleAdmin

PeopleAdmin is the applicant tracking system we use to manage, organize, and process applicant data. The most important responsibility of the Hiring Official is to ensure that each candidate's status is updated in PeopleAdmin in a timely manner.

All applicants will receive an auto-generated response via PeopleAdmin when they apply for a position, but after the initial auto generated email, it is up to the Hiring Official to manage candidate communications and promptly move all applicants through the applicant tracking system. One of the most frequent areas of feedback that we receive from applicants is that communications are either not timely or that applicants do not receive a communication advising them that they have not been selected to continue in the search process.

As previously mentioned, the Hiring Official is responsible for moving each applicant thought the process, based on assessments made in collaboration with the search committee. As applicants are reviewed and move through the process, the Hiring Official must update their status in the system. To do this:

1. Select the box next to the applicant name and hover over the ACTIONS link then click View Application.
2. Hover over TAKE ACTION ON JOB APPLICATION to select the action and move the applicant in the workflow.
3. Move the applicants to "Not Under Consideration" with appropriate reason or to "Interview Pending."

➲ Click the link here for instructions on how to Manage Applicants in the PeopleAdmin system.

Disqualifying Applicants not under Consideration

Once a decision has been made that a candidate will not advance in the process, the Hiring Official must select the appropriate disposition in PeopleAdmin. Please note that PeopleAdmin system will NOT automatically generate an email notification that the applicant was not selected for a screen. You must advise your HR employment specialist that you wish to send an update or email to applicants. Effective communication is important, so we ask that you please contact your employment specialist as soon as you are ready to send out a communication to unsuccessful applicants.   As a best practice, an applicant should be disqualified via PeopleAdmin as soon as possible and notified that they will not advance. There is a common misperception on campus that we should not communicate with an applicant until the conclusion of the search. This is not the case. You are encouraged to communicate often and regularly with your search pool. Failing to communicate timely with applicants can reflect poorly on the university, human resources, as well as on your department or unit.

Sample Communications: **Disqualifying Unsuccessful Applicants (via email)**

Dear [name]:

Thank you for your application for the (position name) Position at William & Mary. We had a very competitive pool of applicants, and after a careful review of all applications we are writing to inform you that you have not been selected for an interview at this time.

We appreciate your interest in employment opportunities at William & Mary and encourage you to apply for additional openings with us in the future. We wish you success in pursuit of your career objectives and thank you again.

You are also encouraged to update applicants on the progress of the search. Again, improving communication with applicants creates positive first impressions and may encourage an applicant to apply for other positions or refer others to apply for a job at the university. The following are suggested search updates that you may wish to use or modify:

Dear [name]:

Thank you for your interest in William & Mary' position of _____. We are very pleased at the response we have received to date. I am writing to provide a brief update with respect to the timeline for the search. The search committee plans to meet in _____ to begin its initial review of the resumes. The search committee will then identify a pool of candidates that it will invite for phone or Skype screens. Following this initial screening, we will invite finalists to campus for in-person interviews. Because of the size of the pool, we anticipate that it will take __ to ___ weeks to complete the search process. As the search process continues, the search committee will advise applicants who will not be invited to continue in the process. However, the committee will not eliminate all applicants until a finalist is selected. Therefore, some candidates may not receive any communication for many weeks and will not receive any further communications until the search is concluded.

We understand that the length of the search process can raise questions along the way or be frustrating. Therefore, if you have any questions along the way, please do not hesitate to contact _____ at _____.

Thank you again for your interest in the ____ position. We look forward to the next steps of the search process.

Dear [name]:

I am writing to update you on the status of the search for _____ at William & Mary. As you know from the last update, we had a large and a very well qualified candidate pool. The search committee has been working diligently for the past ___ weeks to review and narrow the applicant pool. We are in the process of in-person interviews, and unfortunately, you have not been chosen to continue in the search process.

We greatly appreciate your interest in this position and thank you for the time that you took to apply. With so many well qualified candidates, our decisions were not easy.

We wish you the best of luck in your future career endeavors.

Stage Three – Interviewing Candidates

Candidate Short List
Candidates for On-Campus Interviews
Interviewing 101
Evaluating Candidates
Keeping Candidates Engaged throughout the Process

Candidate Short List

Once the initial screening process is complete, you should have identified a short list of candidates for in-person interviews. If you have not, it may be due to several reasons and you should consider discussing strategies for an extended search with your HR employment specialist.

In cases where you have NOT been able to identify ANY candidates that meet even the most basic requirements, you may consider re-advertising the position, or declaring a failed search. For a recruitment process to be declared a failed search, you must provide supportable justification to your employment specialist as to why no one in the applicant pool meets the minimum requirements for the position. At this point, you should return to Stage One of the process and contact your employment specialist to discuss strategies for securing a more robust candidate pool. Things you may consider in collaboration with your employment specialist after a failed/cancelled search:

- Was the position posted for an appropriate length of time?
- Did you make any proactive recruitment efforts? For example in our professional networks, job posting sites, or trade publications?
- Are our requirements, expectations, and pay scale realistic to attract the caliber of talent?
- Was the screening an effective measurement of applicant skills and abilities?

Candidates for On-Campus Interviews

Once your initial screens are complete and you have a short-list of candidates, you are ready to begin scheduling in-person interviews. If a candidate is local to the campus area where interviews are scheduled to take place, be sure to arrange for campus parking on the day of the interview. If the candidate is not local, and interview travel expenses can be approved, arrangements for travel and lodging should coordinated by the Hiring Official. It is important that no travel, lodging or ground transportation should be promised or arranged before discussing with the Hiring Official's departmental travel manager to ensure arrangements are in compliance with university travel authorization policies. In cases of professional positions with vice presidential level supervision, you may refer the candidate directly to the office of the respective vice president to coordinate travel arrangements.

Interviewing 101

While interview styles vary from person to person, it is important that the in-person interview process is objective and consistent for each candidate. In other words, each candidate who walks in the door should walk out the door with a similar and positive interview experience. Here are some basics that should be incorporated into each interview:

- Begin every interview by welcoming the candidate, introducing yourself (and others) and showing an immediate and genuine interest in the candidate, his or her background, and experience.
- Share details about what the candidate should or could expect if they were offered the position and they accepted it. Discussing future goals and future projects will help to stimulate discussion of the real issues he or she might face in the position.
- Explain your role and how you personally, or your team, will interact with the position; this can be best achieved by sharing examples of past and future projects demonstrating collaboration with the position.
- Be comfortable and confident talking with candidates about William & Mary as not only a university, but also as an employer. Some talking points:
    - ❖ Founded in 1693 upon a Royal Charter issued by King William and Queen Mary of Great Britain.
    - ❖ William & Mary is the second oldest institution of higher education in the United States.
    - ❖ William & Mary is a public research institution, and is known as a "public ivy," meaning we are part of a select group of American universities that provide an Ivy League experience, but are public both in terms of operation and cost.
    - ❖ William & Mary artfully blends the tenets of a liberal arts college with the intellect of an elite research university.

➲ Click here for more information on [William & Mary at a Glance](#)

- The questions that candidates ask are often more relevant than the answers they provide. A seasoned interviewer can determine a candidate's motivational factors based on the questions a candidate asks. Reserve time at the end of the interview for the candidate to ask questions because they may indicate how seriously s/he is considering the role and how much research and preparation s/he has done in advance.
- Be candid in your answers and discussion. Giving the candidate an honest picture of the challenges of the position will allow him or her to assess his or her interest and abilities in relation to the requirements and the challenges of the position and helps provide a more meaningful interview experience.
- At the conclusion of an interview, remind the candidate whom his or her point of contact is and explain the next steps in the process and the approximate search timetable. In order to ensure the highest rate of success for an extended offer, this is also a good time to gauge a candidate's interest in the position based on what the candidate has learned about the position.

- Make an effort to listen for how the candidate's prior experience and achievements relate to the position. Encourage the candidate to elaborate with specific examples, especially if they think they do not have enough information to assess the candidate's skills or experience in that particular area.

Behavioral Based Interviewing

Prior to the interview, the search committee should select interview questions that will facilitate making the best hire. Remember that questions should guide the conversation away from potentially prepared or scripted responses and towards genuine conversation and discussion with the candidate that will help you assess if his/her skills and experience align with the stated requirements for the position.

To avoid making selections based on assumptions, intuitions, or other subjective data that is not job-relevant, we encourage search committees to develop behavioral based questions. In a behavioral interview, the applicant is asked to demonstrate his or her knowledge, skills, and abilities by giving specific examples from past experiences. Behavioral based interviewing is based on the premise that one of the best predictors of a candidate's future job performance is his or her past job performance. Rather than asking the applicant what he or she would do, or why he or she is interested in the position, the applicant in a behavioral based interview is asked to describe how the person handled a situation in the past. This can be explored by asking questions such as, "Tell me about a time when…" or "Give me an example of when…". Fill in the blanks with one of any number of skills, knowledge, or abilities the position will require. By gaining insight into a candidates past experiences, you'll develop a reliable indicator of how that individual most likely will perform in the future.

↻ Click the link here for a list of [Sample Interview Questions]

Once you have created the interview questions, it is important that you ask each of the candidates the same set of questions. While you should ask each applicant the same set of core questions, we are sometimes asked whether it is possible to ask a follow-up question. The answer is yes. In fact, it is important to ask follow-up questions. The goal of the interview is to determine how that candidate will perform in the position and not how a hypothetical person will perform. Therefore, we encourage you throughout the interview to ask follow up questions whenever possible to show you are using good listening skills and processing the candidate's comments. In other words, you are not required to stick exactly to the scripted or pre-prepared questions. Asking questions will also demonstrate to the applicant that you are interested in what s/he is saying and will help the dialogue become more dynamic and rich. Structured interviews can often devolve into de facto interrogations – question followed by question followed by question – which is not a natural way to communicate or solicit information. The follow-up question is intended to help the interviewer gain more insight into the specifics of a project or how the applicant performed in any number of given situations.

Sample Communications: Follow Up Interview Questions

Can you tell me more about the different steps that you took to execute that project?

What take-aways did you learn from this project and how have you used these take-aways in other projects?

Tell me more about the relationships that were involved in this project that you had to leverage to help move this project along?

What obstacles did you face in this project and how did you resolve them?

Wow. I would love to hear another example of how you….

Although asking follow-up questions is encouraged, keep in mind that you should only ask questions that relate to the job for which the candidate is applying. You should never ask any questions relating to race or color, national origin or ethnicity, religion or creed, political affiliation or belief, age, sex or sexual orientation, gender identity or expression, disability, marital status, pregnancy status, height, weight, veteran status, caretaker status, or family medical or genetic information. Some basic questions such as "Where are you from?" may be seemingly innocent, but they are not job-relevant (because they may be indicative of national origin), and therefore should be avoided.

Evaluating Candidates

It is important throughout each stage of the search process that candidates are evaluated using objective metrics. In addition to search committee members taking notes with respect to how candidates answer each of the questions, the search committee should develop a rubric that can be used to rank and order candidates.

Keeping Candidates Engaged Throughout the Process

The recruitment process can be time-consuming, and internal scheduling conflicts or other factors can often extend your recruitment timelines. However, if long periods of time elapse without touching base with our high interest candidates, we run the risk of losing their interest, which is why it is important that we manage candidate expectations accordingly.   Share timelines and follow through as promised. If a delay between interviews will extend for a considerable amount of time (two weeks or more), reach out to simply to reiterate William & Mary's interest. This is also a good opportunity to ask if they have any questions, and share an update on William & Mary, and/or happenings in your department to bolster engagement. If you no longer have interest in a candidate, don't leave their candidacy in question – disqualify them as soon as possible.

Stage Four – Selecting the Best Candidate

Assessing Candidates and Submitting a Hiring Proposal
Move Applicants in PeopleAdmin Workflow

Assessing Candidates and Submitting a Hiring Proposal

After in-person interviews have been completed with each candidate, the search committee should meet to review/assess candidates and make recommendations. The goal for this meeting should be to determine the top finalist (or finalists) for the position.

Each hiring proposal must include a detailed justification to support the person selected for hire. After the hiring proposal is received and reviewed, you may also be required to share additional information such as interview notes, grids, tests, and other backup documentation in support of why a successful candidate was chosen. Therefore, it is important that each committee member retain all interview notes and assessment materials, and that these notes and materials only contain objective and factual measurements of competencies contained in the position description or factors that are job relevant.

Important: As previously mentioned, all recruitment, hiring, interviews, and selection recruitment must be maintained for a period of 3 years from the completion of the search. Recruitment records may include, but are not limited to: applications of selected and rejected applicants, position descriptions, copies of announcements and advertisements, selection criteria, evaluations, interview notes, tests, work samples, and rankings.

Move Applicants in PeopleAdmin Workflow

As you continue to review, advance, and disqualify candidates throughout the process, it is important that the Hiring Official continue to update candidacy status in PeopleAdmin. Remember to do this, select the box next to the applicant name (or the candidate's name) and hover over the ACTIONS link then click View Application. Hover over TAKE ACTION ON JOB APPLICATION to select the action and move the applicant in the workflow to either "Interview Pending" or "Not Under Consideration" with appropriate reason.   Reasons for disqualification should be consistent with the established search criteria in the job description. If you have any questions about acceptable or unacceptable reasons for disqualification, please contact your HR employment specialist.

Stage Five – The Offer

Conduct Reference Checks
Create a Hiring Proposal
Extending The Offer

Conduct Reference Checks

Reference checks should be used as a tool to better determine a candidate's viability for in role success based on feedback from previous/former colleagues. You may check references at any time during the process, but it is recommended to not conduct reference checks until a point in the process where a candidate is under serious consideration for hire. You may conduct references for multiple candidates, but remember, you must give similar treatment to each candidate in each respective stage of the selection process.

As part of the online application process, candidates are asked to provide information on professional references and you can access this information in PeopleAdmin.   We require that a *minimum* of two reference checks are conducted prior to extending an offer, but as a best practice:

❖ Conduct three or more reference checks
❖ Ensure that at least two of the references are supervisory references (people that directly supervised the candidate in current or previous roles)

Important: Reference checks are considered confidential so it is important to refer to each applicant's application to ensure authorization to contact current employer has been given. It is also a best practice to confirm with the candidate that you will be reaching out to their references before doing so.

Sample Communications: **Contacting a Reference**

> *"Hi this is [name] from William & Mary. We are contacting you on behalf of [Insert Candidate Name] who gave us your name as a professional reference. [Candidate Name] is being considered for a professional opportunity with William & Mary and we would like to speak with you about your professional relationship with him/her."*

⮐ Click here for a [Sample Reference Check Form](#)

Create a Hiring Proposal

Once reference checks are complete, you should be equipped with the information needed to make a final decision.   As previously mentioned, the decision should be based on objective feedback taking into account assessments from the entire search committee, though the search committee chairperson should have the final decision making authority.

Once a decision has been made, designate the finalist in the PeopleAdmin applicant list, after which you will be able to initiate the Hiring Proposal. If the proposed salary is higher than the amount in budget, the hiring proposal will be re-routed for approval to the budget office, and may or may not be approved. This can take time, and process delays can cost you a top candidate. Therefore, it is important to ensure that budgeted amounts are accurate prior to the end of the search. In addition, as discussed earlier, it is also important that you are managing candidate expectations regarding salary early in the process. The end of the search is not the time to learn that a candidate's salary expectations are far out of alignment.

➲ Click here for a [Flow Chart to Follow After Selecting Your Finalist](#)

➲ Click here for [PeopleAdmin hiring proposal instructions](#) (begin on page 15)

By this point in the process, you should have already changed the status of all unsuccessful candidates to "interviewed but not selected", and have indicated the reason they have not advanced in the process. However, a recommended practice is to designate an alternate candidate in the event that your finalist will not accept an offer. PeopleAdmin will allow you to designate candidates as back up finalists, and to do so you may keep their status at "interviewed".

Extending an Offer

Your HR employment specialist will notify you once your hiring proposal has been approved. Until the hiring proposal is approved, you cannot extend either a verbal or a written offer.

If you extend a verbal offer, you must advise the applicant that it is a conditional offer pending the criminal background check. It is best practice to extend the verbal offer and to immediately follow it with the written offer. Candidates should also be encouraged not to provide notice to their current employer until the background check is complete.

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Sample Communications: **Extending a Verbal Offer**

On behalf of the search committee, I'd like to thank you again for taking the time to meet with us in consideration for the [POSITION] role. I am calling to let you know that we have completed the interview process, and the feedback we received about you was excellent. Specifically, we believe that your background is a strong match with the requirements for this position because [INSERT REASONS WHY FINALIST WILL BE A FIT FOR THE ROLE]. We also felt that [INSERT REASONS WHY YOU THINK THAT THE ROLE WILL BE A GOOD FIT FOR THE FINALIST].

[AFTER CANDIDATE CONFIRMS INTEREST] As such, we are excited to offer you the position and hope that you will accept. The terms of the offer are as follows:

[POSITION TITLE]

[REPORTING TO]
[STARTING SALARY]

Stage Seven - The Acceptance

Your Offer has Been Accepted. Congratulations!
Background Checks & Offer Letters
Your Offer has Been Rejected. Now What?
Disqualifying Unsuccessful Finalists

Your Offer Has Been Accepted

Congratulations! If the position is accepted, notify the finalist that s/he will receive a welcome letter via email from human resources once the background check has been completed. See the next section for more information on next steps.

Background Checks & Offer Letters

If you are hiring an **operational** employee, we require that the background check be completed prior to extending a formal offer letter. Departments and units must use the university approved offer template letter. Unless otherwise agreed to with Human Resources, the offer letter will be generated in central human resources once the background check is complete. Once you have been notified that the background check is clear, you may contact the successful candidate to arrange a start date.   Under no circumstances should any start dates be discussed until this point in the process.

If you are hiring a **professional** employee, a conditional offer letter can be created, advising that employment is subject to completion of a successful (clear) background check.   The offer may be generated within your department before the background check is complete. However, an applicant may not begin employment until the background check is complete.

Please contact your employment specialist or the most current approved offer letter template for professional employees.

Important: Changes to this letter cannot be made without approval of human resources.

It is William & Mary policy to hire individuals only after conducting criminal history and other background checks and after considering whether any past conduct, if repeated, is job related and could substantially adversely affect an important interest of the university or members of the campus community.

To initiate a background check, your HR liaison or employment specialist will generate an email that will be sent directly to the finalist. The finalist will be invited to login to an application station where s/he will be asked to complete an online release form and to submit information for the background investigation.

Background investigations generally take two to three business days, after which the results will be shared with your employment specialist (note that in some circumstances, investigations can take significantly longer, particularly if the applicant has lived in many different locations).

If any issues are generated in the report, the Chief Human Resources Officer will make a determination on whether the finalist is cleared to start work. If there are no issues, or if there are issues that have been cleared by the Chief Human Resources Officer, you will be notified by your employment specialist so that you may contact the finalist and discuss a start date.

➲ Click the link here for [More Information on the Criminal Background Check Process](#)

➲ Click the link here for the full [Background Check Procedure](#)

Once the offer letter has been returned with the new employee's signature, send a copy via email to your employment specialist (or to the Office of Diversity & Inclusion in the case of faculty hires). They will then contact the new hire to begin the onboarding process and initialize the employment data which includes:

- Effective date (when to report to work)
- Link to onboarding paperwork (W-4, Direct Deposit, etc.)
- Banner ID #
- W&M Email Address
- W&M User ID
- Information about Federal Form I-9

Important: New hires <u>MUST</u> complete an I-9 prior to their first day of work.   Section 1 and Section 2 <u>MUST</u> be completed prior to the employee starting work.

Your Offer Has Been Rejected

Now what? Offer rejections happen, and it is important to understand the reason why for tracking purposes. Your employment specialist will ask you the reason for the rejected offer, and your next course of action may depend on the reason offered:

Salary too low: In this case, you may wish to have a follow-up conversation to review the university's extensive benefit package with the employee, and value of non-cash benefits. You should also discuss other non-cash benefits of working at William & Mary, including tuition reimbursement, work-life benefits, leave policies etc.

Candidate makes a counteroffer: If a counter-offer is made, your HR employment specialist can give you guidance on whether the counter offer is or may be viable. Be mindful of internal salary misalignment, which can have adversely impact morale and engagement levels. If the counter-offer is approved by HR, you must then confirm budget approval. If budget can support, re-submit the hiring proposal as a counter offer.

Accepted another offer (no longer available): Do you have a first alternate? If not, you may consider discussing your second alternate. You may also consider re-posting. If there is no alternate, it will be considered a failed search.

Disqualifying Unsuccessful Finalists

Once you have a signed offer letter in hand, it is time to contact all other finalists to notify them that they are not successful. As a best practice:

❖ Follow up with them <u>via telephone</u> to tell them if they are not advancing in the process. Realize that bad news is best delivered in person or over the phone; and always follow up with an email to acknowledge a voice-to-voice conversation.
❖ Treat each applicant as an individual and personalize the communications.
❖ Acknowledge and be respectful of every candidate's time.
❖ Acknowledge disappointment when appropriate and encourage them to consider alternate or future employment opportunities that might be more closely aligned with their skill sets.
❖ If you are too busy to follow through on disqualifications, appoint a designee to manage candidate communications.
❖ Remember that less is more and do not need to go into too much detail. Simple statements work best.
❖ Be prepared to answer difficult questions and stay focused on the above points.

Sample Communications: **Talking Points for Disqualifying Unsuccessful Candidates**

- *The candidate pool for this search was very competitive*

- *While we were impressed with your profile, the search committee has decided not to advance your candidacy for this position*

- *We have identified a candidate whose profile is more closely aligned with the search criteria for this position*

- *We thank you for the time you have invested in exploring opportunities with William & Mary and wish you success in pursuit of your career objectives*

Stage Eight – Before Your New Hire's First Day

New Hire Paperwork
Build an Orientation & Onboarding Plan
Coordinate Department-Specific Onboarding with your HR Liaison

New Hire Paperwork

Timely completion of new hire paperwork is important not only to ensure university compliance with state and federal guidelines, but also to ensure that your new hire is set up with all the tools and systems needed for them to begin work on their first day. In your conversations with your new hire, please encourage them to complete the forms as quickly as possible, if they have not done so already:

Click here for a link to the Veterans Status Form
Access the W-4 Federal tax withholding form through Banner Self Service at MyWM
Access the VA tax withholding form through Banner Self Service at MyWM
Access the Direct Deposit form through Banner Self Service at MyWM

➲ Click the link here for a Checklist of New Hire Paperwork

New hires without internet access can obtain these forms in the Office of Human Resources located in Bell Hall. Human Resources staff have computer terminals available and can assist new hires with the completion of the new hire paperwork.

Build an Orientation & Onboarding Plan

The process of orientation begins with you as soon as the offer is accepted. Before the first day, designate a person to welcome the new employee, familiarize them to their new work area, and introduce other departmental staff. As a best practice, each department should create a checklist of all the tools/resources that a new hire on your team requires to be set up for success on his or her first day.

Human resources can issue to the new employee a complimentary five-day parking pass and instructions on where to go to purchase a permanent parking pass. If you opt to have your new hire start the first day with the human resources office, please contact and coordinate the employee's arrival time with your HR employment specialist.

Think of department processes, systems, and procedures related to onboarding new hires in each department that need to be set up in advance. Examples may include ordering uniforms, getting access to department specific databases, preparing a workspace, ordering a computer, ordering business cards etc.

- Computer access
- Phone access
- Systems/Database Access
- Parking Pass and Parking Locations
- Keys
- Building Access
- ID Card

- How to log on to systems
- Timesheet approval access
- Uniforms
- Safety Equipment
- Work schedule/break times and locations
- Supply room access

Stage Nine – Setting Your New Hire Up for Success

Your New Hire's First Day
Resources Available to New Hires
Scheduling Benefits and College Orientation
New Hire Frequently Asked Questions

Your New Hire's First Day

What a new hire's first day should include will vary from department to department, which is why it is important to coordinate directly with your departmental HR Liaison to insure that your new hire is set up for success and ready to start contributing on his or her first day. At a minimum, your new hire's first day should include the following basics:

- Welcome and show their work area
- Discuss parking and where to park
- Provide department tour and introduction to colleagues
- Issue keys or cardkeys (if applicable)
- Provide a copy of the position description and review expectations, duties and responsibilities
- Explain probationary period and evaluations (for operational new hires)
- Discuss communication: staff meetings, department meetings, division meetings and schedules
- Review dates/time/locations of W&M human resources college and benefits orientation, protocol training, and division meetings/gatherings in the division
- Discuss timesheets and pay dates
- Review department and division mission, vision and goals
- Review office dress code or uniform policy if applicable
- Discuss work hours, lunch, work schedule etc
- Review types of leave, who to contact if sick or unable to report to work, how to request time off and how to process on timesheet
- Provide list of holidays and review schedule
- Discuss safety/security: emergency notification and/or inclement weather alert system
- Assist employee in obtaining email address (if not already completed)
- Call IT helpline to re-set phone display and request password re-set for voicemail (if necessary)
- Explain IT helpline (x14357) and support procedures (phones and computers)
- Discuss ordering business cards and nametags (if applicable)
- Review office equipment (copier-codes, directories, organizational charts, etc.)
- Explain procedures for mailings, obtaining office supplies, tools, equipment, facilities, etc.
- Arrange computer access shared drives and folders and review procedures
- Arrange for tour and introductions of offices of frequent collaborators

- Within 30 days of the hire date, develop and review a performance plan that will be developed jointly by the supervisor and employee
- Have someone take your new hire to lunch on the first day

➲ Click the link here for a [Sample Orientation Checklist](#)

➲ Click here for a [List of Departments and HR Liaisons](#)

Resources Available to New Hires

The first days of employment are a critical window during which it is important to connect new hires with university resources that will ensure their questions are answered and that they are set up for success. Studies show that first impressions are lasting and that employees make up their mind early as to whether they will be a long tenured employee or not. In the first days, weeks, and months, your new hire is formulating his or her opinions about W&M as an employer. When you provide resources to your new hire and create an active onboarding experience, the employee feels welcomed and engaged; whereas employees who feel ignored are more likely to be disengaged and underperform. The university website is a great source of information for new hires and the [New Employee Welcome Page](#) is a great place to start. The following are a list of links that you may consider sharing with your new hires:

➲ Click the link here for information on W&M [Benefits](#)
➲ Click the link here for a schedule of [Pay dates](#)
➲ Click the link here for Information Technology [Accounts and Passwords](#)
➲ Click the link here for information on [Parking and Transportation](#)
➲ Click the link here for Tribe Card Services [ID Office – Faculty/Staff ID Cards](#)
➲ Click the link here for a list of all [Policies & Procedures](#)

Scheduling Benefits & College Orientation

Your HR employment specialist will schedule your new hire for both college and benefits new hire orientation, and we encourage you to support active participation in both sessions.

At College Orientation, new hires hear from a variety of speakers who will inform them of the many benefits, resources and opportunities available to William & Mary employees. They learn about the rich history of William & Mary. In addition, three engaging tours are scheduled throughout the day to get new hires better acclimated to the campus and what it has to offer.

Benefits Orientation is important, as new hires have only 30 days from their hire date to complete and submit benefit enrollment forms. The Office of Human Resources conducts benefits orientation sessions twice a month to help new employees better understand the benefits that are available to them.

⮫ Click the link here for more information and schedules of [Benefits Orientation](#)

New Hire Frequently Asked Questions

Below is a list of questions commonly asked by William & Mary new hires. Consider spending some time with your new hire in the first few days to address these commonly asked questions.

What is Banner?

Banner is online software that William & Mary employees use in several capacities. At the very least, new hires will use [Banner Self-Service](#) for personal information and employment-related records. However, depending on the employee's position, he or she may need access to other Self-Service areas of Banner (such as faculty services, student information, and finance services) or [Banner Admin](#).

⮫ Click the link here for a [Banner Employee Self-Service User Guide](#)

How is time entered?

Most employees at William & Mary are expected to submit their timesheets online using Banner's Employee Self-Service (ESS). Employees use myWM to complete timesheets and check benefits and leave balances. If a timesheet is not approved by the pay period deadline, the employee must submit a manual timesheet to HR.

How do I Activate My IT Systems Account?

An employee's online identity at William & Mary is a unique WMuserid and a secure password. Once the WMuserid account has been established, the employee will receive an email prompting him or her to activate his or her account. Activating an account is a three step process.

⮫ Click the link here for information on [Account Activation](#)

Where do I Park?

New hires need to be reminded that parking permits are required to park on campus and can be obtained from Parking Services.

Conclusion & Appendix

We hope that you will find the information, processes, and example communications in this guide helpful, and that you are now better equipped with tools and resources necessary to bring your searches to the best possible result. Along those lines, we have we have provided a number of sample documents and tools in the appendix that follows.

The Office of Human Resources is here to support you in your efforts to identify, attract, and onboard the best possible talent for open positions at William & Mary. Please do not hesitate to contact us anytime we can be of assistance.

Interview Evaluation Form – Sample A

Candidate:

Interviewer:

Date:

WILLIAM & MARY
CHARTERED 1693

(Rating Scale 1 low – 5 high)

Professional Qualifications	Rating	Notes
Exhibits strong commitment to customer service		
Shows an ability to manage staff and lead teams		
Demonstrates strong interpersonal and relationship building skills		
Possesses strong communication skills		
Demonstrates institutional "fit"		
Exhibits problem solving skills for complex decisions		
Demonstrates progressive experience in field		
Exhibits strong analytical skills		
Additional Qualification #1		
Additional Qualification #2		
Additional Qualification #3		

Overall comments:

Please return this form to:
[INSERT NAME OF HIRING OFFICIAL]
no later than [INSERT DATE]

Interview Questions - What You Can Ask and What You Can't
If you have any questions, please contact the Human Resources office.

IMPORTANT: All settings, including informal gatherings with department members who are not members of the search committee, are considered to be part of the interview of the candidate. Everyone who will have contact with candidates should be made aware of areas of inquiry that are not appropriate or illegal questions that should not be asked in order to avoid future complaints.

AREA OF INQUIRY	LEGAL	ILLEGAL
Address/ Housing/Length of Residence	CAN ASK: ▪ Place and length of current and previous address ("How long have you lived in [city]")? ▪ For applicant's phone number or how s/he can be reached	SHOULD NOT ASK/REQUEST: ▪ Specific inquiry into foreign addresses that would indicate national origin ▪ Names or relationship of persons with whom applicant resides ▪ Whether applicant rents or owns home
Age	BEFORE HIRING ONLY: ▪ If a minor, require proof of age in the form of a work permit or a certificate of age AFTER HIRING ONLY: ▪ Require proof of age by birth certificate	SHOULD NOT ASK/REQUEST: ▪ About the age or age group or date of birth of the applicant ▪ Birth certificate or baptismal record before hiring ▪ Questions that would tend to identify persons aged 40 years and older
Ancestry/ Birthplace/ National Origin	CAN ASK: ▪ "After employment, can you submit a birth certificate or other proof of U.S. citizenship or other proof of the right to remain in or work in the U.S.?" ▪ About foreign language skills (reading, speaking, and/or writing) if relevant to the job Be sensitive to cultural differences ▪ Do not assume mispronunciation of English as a lack of education ▪ Do not interpret silence as inability or unwillingness	SHOULD NOT ASK/REQUEST: ▪ If an applicant is native-born or naturalized ▪ The birthplace of applicant ▪ Questions which identify customers or denomination ▪ About birthplace of his/her parents, grandparents and/or spouse or other relatives ▪ Require applicant to submit a birth certificate or naturalization or baptismal record before employment ▪ About any other inquiry into national origin (for applicant or his/her spouse or parents; maiden name of wife or mother)
Citizenship (continued on next page)	CAN ASK: ▪ Whether applicant is a U.S. citizen ▪ If applicant is not a citizen, whether she/he intends to become one ▪ If you are not a U.S. citizen, do you have the legal right to remain permanently in the U.S.? ▪ If not a citizen, are you prevented from lawfully becoming employed because of visa or immigration status?	SHOULD NOT ASK/REQUEST: ▪ "Of what country are you are citizen?" ▪ If native born or naturalized (for applicant or his/her parents or spouse) ▪ Proof of citizenship before hiring ▪ Whether parents and/or spouse is native born or naturalized ▪ Date of citizenship (for applicant or his/her parents or spouse)

	▪ Statement that, if hired, applicant may be required to submit proof of citizenship AFTER HIRING ONLY: ▪ Require proof of citizenship	
Credit Rating	NO questions may be asked regarding credit.	You may NOT ask ANY questions regarding credit.
Criminal Record (Arrests and Convictions)	CAN ASK: ▪ If applicant will agree to a criminal background check for crimes that reasonably relate to the applicant's fitness to perform the particular job	SHOULD NOT ASK/REQUEST: ▪ To inquire about arrests that did not result in convictions
Disabilities	Accommodations for the interview must be provided. CAN ASK: ▪ "Are you able to perform the essential functions of the job with or without accommodation?" Be careful how applicants with disabilities are evaluated. Do not make judgments based on communication skills of people with hearing and speech impairments. Do not make judgments based on any perceived impairment. The burden of proof rests on the employer to prove it was not discriminating. If applicant discloses a heath condition, you may describe what the position requires and ask if the applicant can perform the essential functions of the job with or without accommodation.	SHOULD NOT ASK/REQUEST: ▪ Do you have a disability? ▪ How did you become disabled? ▪ How severe is your disability? Do not ask the applicant about what kind of accommodation(s) he/she may need until after the interviewer has established that the applicant is qualified for the job and is considering that person for employment. An employer must be prepared to prove that any physical and mental requirements for a job are due to "business necessity" and the safe performance of the job.
Education	CAN ASK: ▪ What academic, professional, or vocational schools she/he attended ▪ About language skills such as reading and writing, if related to the job ▪ Office skills	SHOULD NOT ASK/REQUEST: ▪ The nationality, racial, or religious affiliation of the schools attended ▪ How applicant acquired foreign language ability
Emergency Notification	CAN ASK: ▪ Name and address of *persons* to be notified in case of accident or emergency	SHOULD NOT ASK/REQUEST: ▪ Name and address of *relatives* to be notified in case of accident or emergency
Experience	CAN ASK ABOUT: ▪ Applicant's work experience, including names and addresses of previous employers, dates of employment, reasons for leaving, and salary history ▪ Other countries visited, if relevant	SHOULD NOT ASK/REQUEST: ▪ Questions about age or years at prior employer that would tend to identify persons aged 40 years and older

Family/Relatives (continued on next page)	CAN ASK: • If spouse is employed here • Names of applicant's relatives already employed by company • Names and addresses of parents or guardian of minor applicants AFTER HIRING ONLY: • To ask name, relationship, and address of *person* to be notified in case of emergency	SHOULD NOT ASK/REQUEST: • Name of applicant's spouse • Whether spouse is employed • How much spouse earns • Whether spouse is subject to transfer • Questions about any relative of a candidate • Names of relatives not working for the institution • Name or address of any relative of adult applicant, other than those employed by institution
Gender/Sex	Inquiry as to sex or restriction of employment to one's sex is permissible only where a *bona fide occupational qualification* exists. Burden of proof is on the employer to prove that the BFOQ does exist and that all members of the affected class are incapable of performing the job. CAN INFORM: • That the institution is an equal opportunity employer. AFTER HIRING ONLY: • Can ask about gender for affirmative action plan statistics	SHOULD NOT ASK/REQUEST: • Sex of applicant • Anything which would indicate gender unless job related (Only such jobs in education would be a full time locker room or restroom attendant) KEEP IN MIND: • Sex is not a BFOQ because a job involves physical labor beyond the capacity of some women, nor can employment be restricted just because the job is traditionally labeled "men's work" or "women's work" • Sex cannot be used as a factor for determining whether an applicant will be satisfied in a particular job • Avoid questions concerning applicant's height or weight unless you can prove they are necessary requirements for the job
Marital/Parental Status	BEFORE HIRING, CAN ASK: • Whether applicant meet specified work schedules or has activities, commitments, or responsibilities that may hinder the meeting of work attendance requirements. If such questions are asked, they must be asked of BOTH sexes. • Inquiries as to a duration of stay on job or anticipated absences. If such questions are asked, they must be asked of BOTH sexes. AFTER HIRING ONLY: • Married or single status for insurance and tax purposes	SHOULD NOT ASK/REQUEST: • About marital status before hiring (married, single, divorced, engaged) • About the number and age of children • Information on child-care arrangements • About pregnancy and if applicant plans to have (more) children • Any question that directly or indirectly results in limitation of job opportunity in any way

	▪ Number and age of dependents and age of spouse for insurance and tax purposes	
Military Service	CAN ASK: ▪ Inquiry into service in U.S. armed forces ▪ Branch of service and rank attained ▪ Any education or job-related experience as it relates to a particular job ▪ Require military discharge certificate AFTER hiring	SHOULD NOT ASK/REQUEST: ▪ Military records ▪ Military service of any country other than the U.S. ▪ Type of discharge
Name	CAN ASK: ▪ Have you worked for this organization under a different name? ▪ Is any additional information relevant to change of name, use of an assumed name, or nickname necessary to enable a check on your work and educational record?	SHOULD NOT ASK/REQUEST: ▪ About the name that would indicate applicant's lineage, ancestry, national origin, or descent ▪ If a woman is Miss, Mrs., or Ms. ▪ Applicant to give maiden name or any previous name s/he has used ▪ About names which have been changed by court order, marriage, or otherwise
Organizations	CAN ASK: ▪ Membership in professional organization, relevant to job ▪ Offices held, if any	SHOULD NOT ASK/REQUEST: ▪ To request listing of all clubs applicant belongs to or has belonged to ▪ Names of organizations to which the applicant belongs if such information would indicate through character or name the race, religion, color, or ancestry of the membership
Other Qualifications	CAN ASK: ▪ About an area that has a direct reflection on the job for which the candidate applied	SHOULD NOT ASK/REQUEST: ▪ Any non-job-related inquiry that may present information permitting unlawful discrimination (questions about race, color, national origin, religion, sex, sexual orientation, disability, age, ancestry, marital status, etc.) ▪ If an applicant smokes or uses tobacco products
Photographs	AFTER HIRING ONLY: ▪ May be required for identification purposes	SHOULD NOT ASK/REQUEST: ▪ Photographs before hiring (either requirement or request at his/her option) ▪ To take pictures of applicants during interviews
Physical Data	CAN ASK: ▪ Whether applicant is able to perform the essential functions of the position with our without accommodation.	SHOULD NOT ASK/REQUEST: ▪ To ask about height and weight, impairment, or other non-specified job-related physical data
Race/Color (see also Ancestry/	Can indicate that the institution is an equal opportunity employer	SHOULD NOT ASK/REQUEST:

Birthplace/ National Origin)	AFTER HIRING ONLY: ▪ Can ask about race for affirmative action plan statistics	▪ Any inquiry that would indicate race and/or color ▪ Color of applicant's skin, eyes, hair ▪ Any other questions directly or indirectly relating to race and/or color
References	CAN ASK: ▪ By whom were you referred for a position here? ▪ Names of persons willing to provide professional and/or character references for applicant ▪ General and work references not relating to race, color, religion, sex, national origin, or ancestry	SHOULD NOT ASK/REQUEST: ▪ To request references specifically from clergy or any other persons who might reflect race, color, religion, sex, national origin, or ancestry
Religion/Creed	CAN ADVISE: ▪ An applicant about normal hours and days of work required by the job to avoid possible conflict with religions or other personal convictions Keep in mind that the law requires employers to accommodate someone's religious beliefs if it wouldn't unreasonably burden the employer.	SHOULD NOT ASK/REQUEST: ▪ Applicant's religious affiliation, where and if applicant attends religious services, or religious holidays observed ▪ Applicants may not be told that any particular religious groups are required to work on their religious holidays ▪ About applicant's religion or religious customs and/or holidays ▪ Recommendations from religious officials
Work Schedules	CAN ASK: ▪ Willingness to work required work schedule ▪ If applicant has military reservist obligations	SHOULD NOT ASK/REQUEST: ▪ Willingness to work any particular religious holiday

Any inquiry should be avoided that, although not specifically listed here, is designed to elicit information as to race, color, national origin, ancestry, age, sex, religion, disability, pregnancy, arrest and court record, etc., unless based upon a bona fide occupational qualification.

You can discuss/ask:
▪ The duties and responsibilities of the job (ask questions that are relevant to the job itself)
▪ The organization's mission, programs, and achievements
▪ Career possibilities and opportunities for growth, development, and advancement
▪ Where the job is located, travel, mobility, equipment, and facilities available
▪ The individual's qualifications, abilities, experience, education, and interests
▪ What the person has done in previous job experience that makes them able to perform the job for which they have applied
▪ What problems the applicant had at previous jobs, and what he or she liked and disliked

You may NOT discuss/ask:

- Questions about race, color, national origin, religion, sex, sexual orientation, disability, age, or ancestry
- You may not ask, in a series of interviews for a given position, questions directed at one sex and not the other
- If a candidate has threatened to file discrimination charges
- How long the applicant intends to work

Sample Candidate Evaluation Form

Candidates and Qualifications Rating	Score	Notes
INTERVIEW OBSERVATIONS		
COMMUNICATION SKILLS (People orientation, ability to express ideas clearly and concisely, listening skills, ability to communicate with employees at all levels)		
EXECUTIVE PRESENCE (Impressiveness, poise, professionalism, drive, motivation and energy; ability to make sound judgment and		
JOB KNOWLEDGE AND INDUSTRY ("HR") KNOWLEDGE (ability to perform core job responsibilities; experience with_____;		
PRIOR RELEVANT WORK EXPERIENCE (Stability of employment, prior related experience or other relevant experience, etc.)		
STRATEGIC THINKING (Ability to see big picture, organizational awareness; ability to assess problems and formulate creative and practical solutions; understand competitive and industry trends)		
MANAGING OTHERS/LEADERSHIP CAPABILITY (ability to develop excellent working relationships; proven leadership skills that promote creativity, innovation and improved processes; persuasiveness, team building; consensus building; managing conflict)		
INSTITUTIONAL/ORGANIZATIONAL FIT (Would you recommend this person to interact with senior management? Ability to establish personal credibility with individuals at every level)		
TECHNICAL/SYSTEMS UNDERSTANDING (Experience with Banner or other HRIS systems; ability to analyze data and develop effective reporting tools)		
DIVERSITY Understanding and commitment to diversity; experience working in a multi-ethnic and multi-cultural environment)		
PREFERRED		
Professional certification		
Proficiency with advanced techniques in spreadsheet, database, and presentation software		
Total Score	0	
Selection Committee Member, Interviewer or Team		

Scale for Candidates:

5 Outstanding – Applicant is exceptional; recognized as being far superior to others.
4 Very Good – Applicant clearly exceeds position requirements.
3 Good – Applicant is competent and dependable. Meets standards of the job.
2 Improvement Needed – Applicant is deficient or below standards required of the job.
1 Unsatisfactory – Applicant is generally unacceptable.