Best Practices for Faculty Search
Interfolio Summit 2019

Position Creation

Description & Dates

- Put in a due date: this will send automatic email reminders to your started but not submitted applicants 7 days prior and 1 day prior to the due date
    - You can always update the close date if you have various rounds of application acceptance/review (e.g., first round of review begins with applicants as of November 15th)
- Put in a time frame in the title of the position: Helps for reporting. If you have a search you run every year say Assistant/Associate Professor- put Assistant/Associate Professor Fall 2019
- Qualifications & Application Instructions: If you leave these sections blank, the headers will not appear on the landing page

Required Documents

- Consider the order of your requirements - what is the preferred order for committee review? (e.g.. CV first for easier bulk review)
- If a document is optional, you can change the number required to 0
- You can set the requirement to more than 9, but clicking the pencil icon and typing in the number after you have created the requirement
- Be sure to add the position-specific 'Thanks for Applying' email at the bottom of this page - all submitted applicants will automatically receive the message

Evaluation Settings

- Turn Blind Review on while committee members are making an internal review, then when the committee is meeting together it can be turned off
    - *Blind Review only applies to users in the *Evaluator role*, Administrators and Committee Managers will always be able to see ratings/comments.

Application Forms

- Using forms to help filter your list of applicants
- Utilize defaulting Application Forms at unit levels (where applicable) so your positions automatically have a set of forms for applicants to complete (e.g., 'How did you hear about this position?')

Search Committee

- Ensure your Committee Managers have the correct permissions on the Users & Groups page - they will not show up as an option to be added otherwise

Position Creation (cont.)

Internal Notes

- Enter relevant institutional information based on position - e.g., Institution-specific job code, rank information for position, attach potential interview questions etc.

Position Review Page:

- Ensure your position has a Position Status- your Evaluators will not be able to view the Applicant List if there is no status active
- Publish your Apply Now page - if you forget, Interfolio will auto-publish on the position's open date

Position Management

Filter

- Filter by form responses: allow you to filter your applicant list by how they responded to any custom application forms created
    - For example: What is your specialization? mechanical engineering, chemical engineering, petroleum engineering, electrical engineering
    - You could filter to see which applicants selected 'mechanical'
    - Use to filter out unqualified applicants: filter by response, apply an Application Status to the group, notify the applicants if applicable, and archive
        - *Archiving applicants you're no longer considering cleans up the active applicant list for your search committees.*

Application Statuses:

- Application Statuses override position statuses. Use these to allow an individual or a select group of applicants to update materials

Bulk Actions:

- Read
    - You can read applications in bulk. Additionally, in the reader, you can add tags, comments and fill out ratings using the 5-star rating scale
- Tag
    - Tags are a more casual tool used to sort and filter applications. Tags are viewable by the entire search committee.
    - Tags can be assigned by any user with access to the position. Evaluators can remove their own tags though Administrators and Committee Managers can remove any tags added
    - Common use cases:
        - To assign applicants to committee members e.g., "Madison to Review"
        - Committee members to indicate which applicants they have reviewed e.g., "Madison Reviewed 10/18"
        - Flag for committee e.g., "Applicant Missing XYZ"
        - Spotlight an element of the application - e.g., "Research Experience"

Position Management (cont.)

<u>Bulk Actions:</u>

- Assign Application Statuses
  - Leverage your filtering options to bulk assign Application Statuses and progress various groups of your applicant pool
  - Assign a group and/or individual a status, filter by that status and *then* take the action to email the applicants - to ensure you're communicating with the correct part of your applicant pool
- Email
  - Confirm your available Message Templates on your Administration page - opportunity to provide standardized messaging for your search committees
- Additional Options (the three dotted button)
  - Download - full applications
    - Option to download single documents lives within each applicant's profile in your position
  - Archive

Two Stage Search:

- Instead of adding additional requirements mid-search, use the Additional Documents option. Then you can apply an Application Status that allows shortlist/longlist applicants to update their materials. When you apply a status, you can send an email to those selected applicants and include what additional materials you're requesting.

Requesting Letters of Recommendation (3 ways using Faculty Search)

<u>Confidential or Non Confidential Letter of Recommendation Document Requirement</u>:

- Allows applicants to request letters before submitting and pending letters to be automatically available to the committee once the letter writer completes the request

<u>Multi-Stage Search</u>:

- Once you've narrowed down the applicant list to a short list, use an Application Status that allows applicants to update their materials. Ensure your Document Requirements allow for applicants to 'Add Additional Documents' and they can request letters from that section of their application

<u>Committee Requested Letters:</u>

- Request reference contact information from applicants using a Custom Application Form and have Administrators or Committee Managers send requests to Letter Writers on behalf of your finalists.

Reporting

- Applications Report
  - Provides most comprehensive information available per applicant
  - Save any reports you run often or need to refer back to regularly
  - Add Form Response values as columns to your report
  - New: Option for Administrators to share saved reports with other Administrators
- Positions Report
  - Get a summary view of your positions, their current status, number of applicants - and any additional position-specific information you may be looking for
- Forms Report
  - Pull the aggregate EEO information for your positions
    - *Administrators w/ EEO access: If you're looking for applicant-specific responses, run the Applications Report and add EEO questions to your column selection*
- Logs
  - Messages Sent: view any emails sent to applicants from Faculty Search
  - Position and/or Application Status Changes: view the various statuses your positions and/or applicants were assigned during committee review