Academic Personnel Services Workshop

Tenure-Track Faculty Search and Appointment Process
Workshop Objectives

• Walk through the process of how to run a TT faculty search
• Walk through the process of TT faculty appointments
• Look at the new Request for Appointment Form (RFA) (launching 9/19/22) and what is required for the RFA package
• Explain Alternative Credentialing and why it is necessary
• Look at the new Alternative Credentialing Form (launching 9/19/22)
What is Interfolio Search?

• Faculty Applicant Tracking System
• Allows searches to:
  – Be posted on public facing sites such as Higher Ed Jobs, Inside Higher Ed, and Diverse Issues
  – Accept applicant materials in one place, rather than multiple emails
  – Collect EEO self-identification data
  – Easily route approvals through a standard workflow
How to Access Interfolio

- Internal Users (Faculty & Staff) – tiny.utk.edu/Interfolio using NetID & Password
- External Users (including GRA’s and Students) – account.interfolio.com/login
User Types

- **Evaluators (Search Committee Members)** are assigned to one or more search committees by an Administrator or Committee Manager. Evaluators can view applications and, if settings allow, add ratings to applications.

- **Committee Managers (Search Chairs)** supervise searches at the unit level. Committee Managers can create and edit positions, update applicant and position statuses, view reports, add notes, communicate with applicants, and evaluate applications.

- **Administrators (Deans, Department Heads and department/college staff)** can create, manage, and monitor searches at their assigned unit, or at units in the hierarchy below their unit. They can also control settings and permissions for the units administer.

- Other access includes **Institutional Administrators and EEO Officers**
When do I use Interfolio Search?

• Anytime a position search is needed, regardless of Tenure or Non-Tenure Track.
• Searches can be published (public) or private (internal – open to entire system)
• When not to use search – approved exceptions: spousal/partner, opportunity, or ORNL-joint appointments
<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>College dean submits search projection requests for the academic year to the provost for approval (additional requests can be made on an ad-hoc basis as needed).</td>
</tr>
<tr>
<td>2</td>
<td>Search committees are formed and required training completed. All search committee members should complete STRIDE training prior to search and the chair of the search committee should also complete the OED-FA training for faculty search committee chairs (if training is out of date or has not been previously completed).</td>
</tr>
<tr>
<td>3</td>
<td>The position description is drafted, including the identification of required qualifications and application materials. It is recommended that the search committee establish a timeline for the search, as well as evaluation criteria and rubrics at this stage.</td>
</tr>
<tr>
<td>4</td>
<td>The departmental representative enters the position into Interfolio, including the names of all search committee members and the dates of the required training described in (2) above, and submits the position for approval. The position will be routed through the department, college, faculty affairs office, and OED.</td>
</tr>
<tr>
<td>5</td>
<td>Once all approvals are granted, the departmental representative changes the position status to “accepting applications” and publishes the position. Publishing the position will make it discoverable by several advertising services funded by Provost’s Office including the Chronico of Higher Education, Inside Higher Ed, and Diverse Issues in Higher Education. See OED’s instructions regarding advertising and recruiting applicants at <a href="https://oed.utk.edu/steps/">https://oed.utk.edu/steps/</a>. Positions for internal searches should not be published otherwise they will be discoverable by audiences outside of the UT System (note that all internal searches are open to everyone in the UT System). Even though they are not published, applicants should be directed to submit materials via the position URL in Interfolio. The Office of Faculty Affairs also maintains a webpage listing all internal searches and will post all internal search positions there.</td>
</tr>
<tr>
<td>6</td>
<td>The search committee reviews applicants and conducts initial screening interviews.</td>
</tr>
<tr>
<td>7</td>
<td>The search committee identifies the principal and alternative candidates and creates strengths and weaknesses statement for each candidate according to the guidance found at OED’s website: <a href="https://oed.utk.edu/sites/select-principal-and-alternate-candidates/">https://oed.utk.edu/sites/select-principal-and-alternate-candidates/</a>.</td>
</tr>
<tr>
<td>8</td>
<td>The search committee chair submits the narrative summary which involves (1) indicating in Interfolio which candidates are in the principal and candidate pools and adding the strengths and weaknesses statement to each candidate record and (2) completing the narrative summary form in Dynamic Forms. For more detailed instructions see <a href="https://provost.utk.edu/wp-content/uploads/sites/10/2020/12/Steps-for-Narrative-Summary-Process-updated-3.5.21.pdf">https://provost.utk.edu/wp-content/uploads/sites/10/2020/12/Steps-for-Narrative-Summary-Process-updated-3.5.21.pdf</a>. The narrative summary routes through workflow for all approvals. Once final approval is received, campus interviews can be scheduled.</td>
</tr>
<tr>
<td>9</td>
<td>Once the finalist has been identified, the departmental representative should select the “Close Position” action and select the candidate, which will route the request through the approval process. (Note this is equivalent to the previous RTMO - Request to Make an Offer. This does not “hard” close the position and will allow for reopening if another candidate needs to be selected).</td>
</tr>
<tr>
<td>10</td>
<td>Once the RTMO is approved, a Recommendation for Faculty Appointment (RFA) packet is submitted via email to Faculty Affairs at <a href="mailto:vppafacultyaffairs@utk.edu">vppafacultyaffairs@utk.edu</a>. See <a href="https://provost.utk.edu/hiring-process/">https://provost.utk.edu/hiring-process/</a> for more information about the RFA.</td>
</tr>
</tbody>
</table>

Faculty Affairs will process the RFA and send an official appointment letter to the candidate via DocuSign. Once the candidate accepts, the candidate should be marked "hired" and all other applicants should be changed to the appropriate disposition code in Interfolio by the departmental representative. Faculty Affairs will then close and un-publish the search. Note that a departmental representative will be responsible for processing all other HR actions related to the hire.
Before You Begin

• Confirm the position number and position are on your unit's list of searches approved by the Provost. If a search is not on that list, we will not approve the search request until approval is given.

• Select your search committee and identify a chair

• Search committee members should complete STRIDE training

• Search chair should attend an OED-FA training prior to the search being launched (if possible)

• Establish a timeline, evaluation criteria, and rubrics
  – Open-rank searches
How to Create A Search (Quick Steps)

• Faculty Search > Positions > New Position
How to Create A Search (Quick Steps)

- Faculty Search > Positions > New Position > Create Position

![Create Position Form](image)

Please select information about the position you want to create. You cannot make changes to these fields once the position is created.

- **Type**
  - UTK Tenure Track Faculty

- **Search For or Select Unit**
  - The University of Tennessee - Knoxville

- **What kind of position would you like to create?**
  - A new position
  - Clone from an existing position

[Create] [Cancel]
How to Create A Search (Quick Steps)

• Faculty Search > Positions > New Position > Create Position > Basic Information
  • Title ("Asst/Assoc Professor of Art, Fall 2023")
  • Location
  • Open Date
  • Rolling vs Specific Date
  • Position Description
    • Open-rank criteria
  • Qualifications
  • Application Instructions
  • Public vs Private
How to Create A Search (Quick Steps)

- Faculty Search > Positions > New Position > Create Position > Basic Information > Required Documents

![Required Documents](image-url)

- Add Requirement
- Additional Applicant Options
- Applicants may add additional documents
- Send a message on application submission

[Save & Continue] [Skip Step]
How to Create A Search (Quick Steps)

- Faculty Search > Positions > New Position > Create Position > Basic Information > Required Documents > Evaluation Settings

**Evaluation Settings**

0 Criteria

Drag and drop the criteria in the list below to change the order they will appear in the application review process.

*Note: at least one criterion must be created in order to rate candidates.*

- [ ] Add Criterion

**Blind Review**

- Evaluator should not see others’ comments and ratings

- Save & Continue  |  Skip Step
How to Create A Search (Quick Steps)

- Faculty Search > Positions > New Position > Create Position > Basic Information > Required Documents > Evaluation Settings > Search Committee
How to Create A Search (Quick Steps)

- Faculty Search > Positions > New Position > Create Position > Basic Information > Required Documents > Evaluation Settings > Search Committee > Internal Notes
How to Create A Search (Quick Steps)

- Faculty Search > Positions > New Position > Create Position > Basic Information > Required Documents > Evaluation Settings > Search Committee > Internal Notes > Position Summary
Search & Approval Workflows

- Workflows vary by department/college

**Example Workflow**

<table>
<thead>
<tr>
<th>Step</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department Rep Enters Search/RTMO</td>
</tr>
<tr>
<td>Department Head</td>
</tr>
<tr>
<td>College Budget Director/College Reviewer</td>
</tr>
<tr>
<td>Dean/Associate Dean</td>
</tr>
<tr>
<td>Faculty Affairs Reviewer</td>
</tr>
<tr>
<td>OED</td>
</tr>
<tr>
<td>Original Submitter Notified of Approval</td>
</tr>
</tbody>
</table>
You’ve Received Applicants…

Now What?!!
Narrative Summary

• Search Committee chair will identify in Interfolio the primary and alternate candidates by changing the applicant status and changing the position status to “pre-interview/narrative summary.”

• List candidate strengths/areas of opportunity on the candidate application notes

Application Note
strengths & weakness
Committee chair will submit the narrative summary form by completing the Dynamic Form. The form will route through for approval and once final approval is received, campus interviews can be scheduled.

Tiny.utk.edu/narrativesummary
Request to Make an Offer & Appt Letters

• Once a candidate is selected for hire, the departmental rep should add any relevant hiring notes to the candidates packet and select the “close position” action.

• The request will route through approvals and the departmental rep will be notified once the final approval has been received.

• Once the approval has been received in Interfolio, the department/college will submit a Recommendation For Appointment (RFA) packet to Faculty Affairs.

• Faculty Affairs will process the appointment letter and send the official letter to the candidate via DocuSign.
RFA Packages

• Include:
  – Completed RFA form
  – Alternate Credentialing form (if needed)
  – Documentation of any special approvals
  – Any memos
  – Unofficial offer letter
  – CV

• Overview of updated RFA form
  — tiny.utk.edu/rfa
Alternate Credentialing

• Faculty credentialing requirements are set by SACSCOC:

• If the candidate does not meet these requirements, alternate credentialing **must** be submitted.

• Alternate credentialing is treated as a transcript and uploaded to the faculty’s personnel file.

• Alternate credentialing is specific to the course(s) being taught and should be resubmitted any time the faculty teaches a new course.

• Overview of new Alternate Credentialing form
  – [tiny.utk.edu/ACform](https://tiny.utk.edu/ACform)
RFA Packages

• The life of an RFA:
  – College submits complete RFA package to vpfacultyaffairs@utk.edu.
  – An Academic Personnel Specialist (APS) reviews the package for accuracy and completion.
  – The package is sent to the Vice Provost for Faculty Affairs for review and approval.
  – Once approved, the package returns to the APS to create the official appointment letter.
  – The official appointment letter is sent to the candidate via DocuSign. (Note: DocuSign automatically voids after 7 days.)
  – Once signed, a copy of the completed appointment letter is sent to VPFA, college level contacts, department level contacts, and HR.

• Please allow 14 business days from the time the complete and accurate RFA is submitted for the official appointment letter to be sent.
Wrapping Up The Search

• Once the candidate has signed the official appointment letter, the departmental rep will change the candidate to “hired” in Interfolio and disposition code the remaining applicants.
Resources and Quick Links

• Interfolio Log In (for Internal users) – tiny.utk.edu/interfolio
• Search Process Help – https://provost.utk.edu/interfolio/
• OED – oed.utk.edu
• RFA form – tiny.utk.edu/rfa
• Alternate Credentialing form – tiny.utk.edu/ACform
• Faculty Affairs Contact Info – vpfacultyaffairs@utk.edu
Questions? - Thank you for joining us!

• Next workshop
  – Promotion of Non-Tenure-Track Faculty
  – October 20th 9:00-11:00 AM
  – Register in K@TE

• Don't forget Office Hours!
  – NEW every Tuesday 10:00-11:00 AM
  – Every Wednesday 2:00-3:00 PM
  – Email vpfacultyaffairs@utk.edu to get the Zoom link

Contact Us

Melanie Finnegan
msfinnegan@utk.edu
(865) 974-6152

Alyssa Thom
athom2@utk.edu
(865) 974-7805

Jenn Western
jedwar75@utk.edu
(865) 974-0855