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| **Process Step** | **Description** | **Approval Needed** |
| **Step 5: Establishing a Screening Matrix Telephone Interview Questions Reference Check Questions** | YOUR JOB IS POSTED, YOU ARE ADVERTISING….AND NOW IS THE TIME FOR THE COMMITTEE TO MAKE SURE THAT THERE ARE MATERIALS for the search committee to do their job: Screening Matrix and Phone interview questions.  When the committee has secured Department approval, the Chair/Director sends an email to the Dean asking that these “department approved” documents be approved by the Dean. This is done in an email, with the matrix, phone interview and reference check questions attached.  When the Dean has approved, the Administrative Director will forward the email and approved attachments to the E&A office contact. This is just for their information.  THE “SCREENING MATRIX” HAS TWO PARTS. A SINGLE PAGE TO SCREEN FOR “MINIMUM” QUALIFICATIONS (TAKE THE WORDING RIGHT FROM THE APPROVED JOB DESCRIPTION). Minimum qualifications should be “yes” or “no”.  THE SECOND PART IS MORE DETAILED, FOR “PREFERRED QUALIFICATIONS.” Preferred qualifications can be ranked or assigned points. The categories for preferred qualifications NEED TO COME RIGHT FROM THE APPROVED AD.  REFER TO THE MATRIX EXAMPLE. THE A&E WEBSITE HAS EXAMPLES OF THIS MATRIX. THERE ARE MANY WAYS IN WHICH THIS CAN BE DONE. Your unit might have some from previous years that can be adapted.  Complete proposed **matrix** of minimum and preferred qualifications as advertised in the vacancy announcement. The committee should not matrix applications for any **qualification** that was not advertised in the vacancy announcement or reasonably inferred from the announcement. *(Section C.4 of COFS)*  Also write the telephone interview and reference check questions to be submitted at the SAME TIME. Your unit may have questions they have used in the past. These can be adapted.  **Reference check**s, like telephone interviews, must use a standard set of questions.  Prior to **telephone interview**s occurring, the committee will need to submit a list of telephone interview questions for approval. Telephone interview questions must:   * be job-related using position based criteria * ask about the applicant’s commitment to diversity * not use any discriminatory language * ask the applicant’s if the committee has permission to check references, including references that are NOT on their reference list  *(Section C.8 of COFS)* * ask this mandatory question: “Given the opportunity, would you hire or re-hire this applicant? Why or why not?” * At least two (2) committee members should be present for reference checks. At least two (2) references for each applicant must be contacted. The reference check interviews must be documented and the notes from the interviews need to be kept and turned in as part of the official search file when the search is complete. *(Section C.9 of COFS)* | Chair (or director) and dean (Approvals must be received **prior to** using the matrix to screen applications.)  To EAO reviewer role; for information only. |