



Hiring Authority (HA) Checklist for Staff / MPP recruitments

Job Card # & Position Title	Hiring Authority Signature

Phase 1: (steps may be concurrent)

- ☐ **Job Card:** Initiate recruitment request by logging into PageUp and creating a [Job Card](#). Your Division assigned HR partner can help with this.
- ☐ **Position Description(PD):** Create new [position description](#) for a newly created job or review position description (PD) for job. The PD should be attached to the job card. Human Resources will review the position description and notify the HR Partner associated with the job card.
 - ☐ **Position Number:** Must be created by Budget and added to the Job Card. If this is for an intermittent hourly pool, add additional positions using the same position number.
- ☐ **Vacancy Announcement:** Create or review [vacancy announcement](#).
 - ☐ **Identify Anticipated Salary:** The job posting will include the salary range for the classification. An optional “anticipated hiring range” can be identified for the job posting based on department budget and must be reviewed by Human Resources.
- ☐ **Identify Recruitment Sources:** In the Job Card choose which recruitment sources should be utilized to advertise the position. Regardless of what is checked on the job card, the **default (free) posting locations are: CSU Careers, Cal Poly Human Resources LinkedIn, Norcan, KMUD**

To request a job be posted on an additional source please leave a note in the Additional/Other Advertising Sources field – fees may apply.
- ☐ **Receive access to the Recruitment Smartsheet from the HR Partner**

- ☐ **Identify Search Committee:** Determine Search Committee Chair and members.
 - ☐ Chair should hold a position at a higher level than vacant position
 - ☐ Composition of committee should be diverse
 - ☐ At least one appointed member should be exceptionally familiar with the position's responsibilities and duties. They will be the subject matter expert.
 - ☐ Certain Unit positions require a committee member(s) from the same unit (ie. Unit 4)
- ☐ **Approve Final Vacancy Announcement:** Human Resources will provide the final Vacancy Announcement for final edits and approval.
- ☐ **Charge Meeting:** Upon posting the job, and before reviewing the applications, the HA or their designee should schedule a charge meeting. This meeting will include the Hiring Manager and the entire Search Committee or chair. The HA will discuss any priorities or details associated with the recruitment. See [Appendix B](#) below.

Phase 2 & Phase 3:

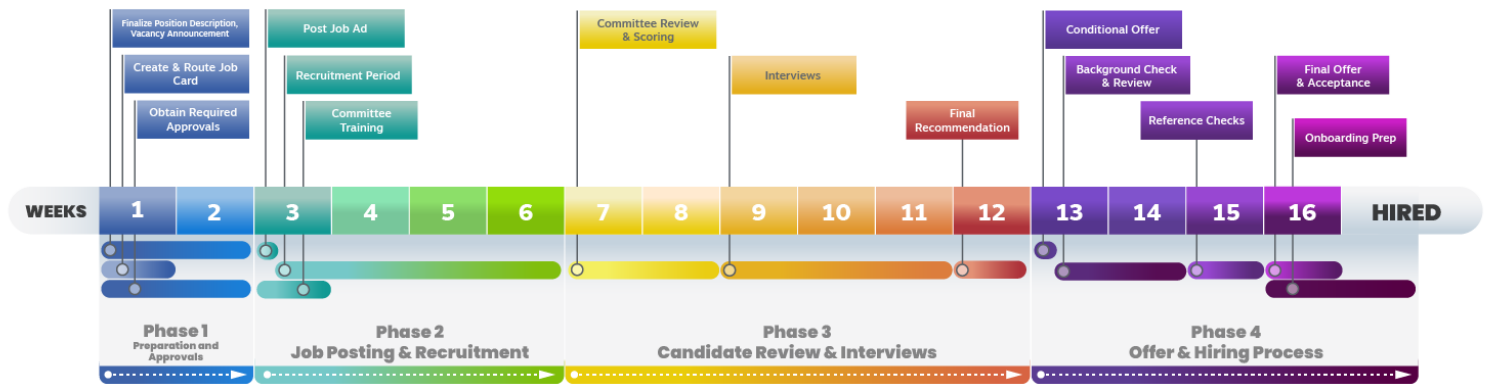
Previous steps in these Phases are completed by the HR Partner and the Search Committee.

- ☐ **Review Recommended Candidate(s):** Review recommended candidate justifications put forth by Search Committee – these candidates will be in the status of Hiring Authority Review Needed.
 - ☐ HA updates the finalist's status in Page Up to:
 - ☐ Interview Complete – Candidate Recommended – ROI Form Request : for the candidate they want to move forward
 - ☐ Hiring Authority Reviewed – Hold : for candidate(s) that are not being asked for a reference check
- ☐ **Reference Checks Occur:** After the ROI has been completed by the candidate the HR Partner confirms that there are two supervisors listed and sends the Default PageUp Reference Check questions through PageUP

Phase 4:

- ☐ **Initiate Conditional Job Offer Approval:** After receiving completed reference checks the HA will review and update the status to **Reference Checks Complete – Candidate Recommended (For HR Review)**.
- ☐ **Conditional Job Offer:** HR Partner will review the candidate recommended and set status to **Candidate Recommended – HR Approved**. The HA will receive an email letting them know they can provide a conditional offer to the candidate and will include the approved salary range or step salary.
 - ☐ If the HA would like to offer outside of the provided salary/step range they would change the applicant status to **Optional – Request to Offer Above HR Recommendation**. HR will review, if approved it must also be approved by the appropriate Vice President. Once the Hiring Authority is notified of the approval, the job may now be offered to the successful candidate.
- ☐ **HA notifications to HR:**
 - ☐ HA updates candidate status to **Conditional Offer Accepted – HR Request to Initiate Offer Process**
 - ☐ Any final changes to the offer details
- ☐ **HR Partner initiates appropriate Background Check (& possible LiveScan):** After satisfactory results the HR Partner will prepare an offer letter.
- ☐ **Final Offer Extended:** The final offer is extended to the candidate and shared with the HA. The HR Partner will change the candidate status to **Formal Offer Extended**. The status will update automatically to **Formal Offer Letter Accepted** or **Formal Offer Declined** depending on what the candidate enters.

STAFF/MPP ESTIMATED RECRUITMENT TIMELINE



Appendix A

Definitions

Conditional offer: The initial job offer with basic details. Upon acceptance the background check can be submitted per the [Fair Chance Act](#).

Appendix B

Charge Meeting Agenda

As the Hiring Authority it is important to discuss items below during the first search committee charge meeting.

1. Outline the purpose and scope of the search, including the position's responsibilities and qualifications, the timeline for the process, and the specific procedures including HR procedures to be followed. This meeting is typically held with the search committee or committee chair to ensure everyone understands their roles and responsibilities in the hiring process.

2. CONFIDENTIALITY is important. Please do not reveal the identity of any of the candidates at any time, either during the search or after it has concluded. This is especially important in the event that we may have internal candidates and/or candidates several Search Committee members may know. However, on-campus interview candidates are public knowledge.
3. Any discussions between Search Committee members are to remain confidential.
4. Don't discuss ratings with anyone {including other Search Committee members} until everyone on the Committee has had a chance to review all the files.
5. When doing ratings, it is okay to make notes under the Comments section on the screening form. However, as these rating forms may become public record, don't write anything that you would not want READ IN A COURT OF LAW.
6. If you personally print off applicant/candidate resumes, please keep them in a secure place. Once the search is completed, you will be asked to turn all copies into the administrative support for shredding.
7. Internal Applicants: If an internal applicant/candidate is not moving forward in the search process, please let them know prior to the public announcement of finalists by Search Chair or Hiring Authority by phone or in-person {no messages}.
8. If you have any personal knowledge about an applicant/candidate, please DO NOT share it with the Committee. If you have any questions regarding this, please bring it to the attention of the Hiring Authority in one-on-one conversation, in person or by phone. Do not leave a voice mail message.
 - a. Conflict of interest/recusal from consideration of applicant by committee member: when to disclose {immediately to Hiring Authority or Chair}; recuse when the applicant is discussed; sharing info determined by Chair after paper screening/prior to Finalist selection for on-campus interview.
9. If you get unsolicited information from any staff/colleague, etc., about an applicant/ candidate, tell them thanks for their information and do not share the information they provided to the committee. You may inform the chair privately if you have any concerns or questions.
10. Social Media: No social media info used in the search process except "Linked-In" - if an applicant sends a web link, it may be

viewed by committee members.

11. Refrain from using e-mail or voice mail as a forum to discuss unusual circumstances that may arise. Anything in writing must be kept for three years and could be used in a court of law if subpoenaed. SPEAK IN PERSON.
12. Ensure you are implementing strategies for avoiding unconscious bias in the hiring process.
13. When pre-screening for Minimum Qualifications: The Hiring Authority ensures they are interpreting the qualifications and communicating it clearly to the Search Committee. Consult with the charging party for any clarifications needed. When pre-screening, a committee member should be looking for whether or not a candidate HAS or DOESN'T have the qualification(s), not to what degree.
14. Use the **8 Guidelines Reference Checks and Employment Verifications** to ensure the Search Committee follows the process correctly.
15. Interviewing Guidelines - review the [California Department of Fair Employment and Housing](#) to understand what you can not inquire about.

Please return this completed form to your HR Partner. You can work with your HR Partner if you have questions at any step.

Hiring Authority signature acknowledging review of Charge Meeting Agenda: