

Chapter 4 – Interview Process

Screening and Interview Processes

Veteran's Preference in Screening

State law (MCA 39-29) requires public employers, including units of the Montana University System, to provide preference in initial employment for veterans and certain eligible relatives of veterans by:

- Adding points to the raw score of a numerically scored [screening instrument](#), or
- Hiring the veteran or eligible relative of a veteran if, at the conclusion of the search process, there were commensurately equally qualified candidates among whom was the veteran.

MSU uses the first of these options in administering veteran's preference for executive, administrative, faculty, and contract professional positions. To ensure compliance, Human Resources | Affirmative Action sends a veteran's preference notice form to applicants upon their request.

When the Veteran's Preference Claim form is submitted for faculty and professional positions, Human Resources | Affirmative Action notifies the search committee chair or search support staff and explains how the veteran's preference points are to be administered.

Veterans and eligible relatives of veterans who do not complete a veteran's preference claim are not given point preference under Montana law, even if the committee can determine from the resume that the applicant is a veteran.

State veteran's preference applies only to initial hire with the institution.

Search support staff must keep accurate records that show the committee's compliance with the Montana Veteran's Preference Act.

Equal Treatment in Search Process/Same Similar Experience

Search and screening committees must ensure that applicants are treated fairly throughout the screening process. Specifically this means that candidates at the same stage of the search process will have received the same treatment as all other applicants at that same stage. Further, committees must be conscientious of any action which gives, or appears to give, one candidate an unreasonable or unfair advantage over another.

The most important thing to consider in determining finalist interview schedules is that **all candidates must be treated equally**. If one candidate is interviewed by telephone, all candidates must be interviewed by telephone. If one candidate is brought to campus for an interview, all other candidates must be interviewed on campus. If one candidate lectures on his or her research, all other candidates must be given the opportunity to present their research.

Each finalist visit should also be as much like another's as possible in regard to time for interviews, social time, free time, meals, and meetings with the committee. This helps ensure fairness and guarantees that committee members evaluate candidates based on same - similar experiences.

Documentation of Search Process

At every decision point in the search process, committees must maintain accurate records of the specific, job-related reasons why they did or did not advance an applicant for further consideration. As the screening process continues, the rationale for each decision will necessarily become more detailed. In essence, if the Office of Human Resources |

Affirmative Action were to get the file for audit purposes, they should be able to reconstruct the search process by the documentation in the file.

Interview Priority Policy

The hiring authority establishes the interview pool in conjunction with advice from Human Resources | Affirmative Action. University policy requires hiring authorities to interview women, minorities, covered veterans, and persons with disabilities who are in the finalist pool. Human Resources | Affirmative Action knows the protected class status of applicants from the EEO data forms sent to and received from applicants.

Interview Guidelines

Handling Internal Applicants

To ensure fairness and objectivity when there are internal applicants in a search pool, search committee members should maintain absolute confidentiality in regard to committee deliberations and should never discuss their personal feelings about any applicants, particularly internal applicants at committee meetings.

Further, the names of internal applicants, their status in the search, or their strengths and weaknesses should never be discussed with anyone outside the committee except the hiring authority and Human Resources | Affirmative Action. Internal candidates should not be given a "courtesy interview" simply by being an internal candidate. Only those candidates who are qualified and potentially likely to fill the position, should be moved through the search process. As well, internal candidates do not get preferences by being internal; the internal candidate needs to be as qualified as the external applicants for consideration of the position(s).

Committee chairs or hiring authorities should contact internal applicants by telephone or in person to tell them that their applications are no longer being considered or that they were not advanced to the next stage of review at that time.

Interviewing Foreign Nationals

Civil Rights laws prohibit search committees from discriminating against applicants on the basis of national origin. Immigration and naturalization laws require that employers hire only "aliens who are eligible to work in the United States." Learning the latter without violating the former is difficult.

Committees may ask interviewees the following: "*Are you eligible to work in the United States?*" They may follow this up with a question, "*What type of Visa do you currently have?*"

Note: If committee members ask one candidate about her eligibility to work, they must ask all candidates the same question. It is usually not necessary to ask this question at all since most foreign nationals are potentially eligible to work in the U.S.

Pre-employment Inquiries

No inquiries should be directed to any candidate concerning race, color, religion or national origin. The use of such inquiries, either directly or indirectly, may weigh significantly in the decision as to whether or not the law has been violated. Only information that is necessary to assess an applicant's competence or qualification for a job should be asked.

Gender: Pre-employment inquiries as to gender, or asking the applicant to choose among Mr. Mrs. Ms. as a title, may appear to be unlawful unless based on a bona fide occupational qualification. Questions concerning marital status, pregnancy, future childbearing plans, or number and age of children should be avoided. Such questions can be unlawful if used to deny or limit employment opportunities of female applicants.

Religion: Inquiries concerning an applicant's availability to work during an employer's scheduled work hours can have an exclusionary effect on the employment opportunities of persons with certain religious practices. The EEOC will consider the use of such inquiries unlawful unless employer can show: (1) such an inquiry did not have an exclusionary effect on employees or applicants needing an accommodation for religious practices; or (2) the inquiry was justified by business necessity.

Age: Inquiries regarding applicants' age, or perceived age or retirement status, should not be utilized as a factor in the search process. A person's actual age may be ascertained after employment for purposes of calculating employee benefits and the like.

Interview Process

The first stage of the interview process is typically a Telephone Screening Interview with each of the qualified applicants. After the Telephone Screening Interview, for those candidates that are determined to be the most qualified, Reference Checks can be conducted in an effort to narrow down the pool of candidates to select finalists. Reference checks may be done as the first stage and then Telephone Interviews, however, each stage must be completed before you move to the next stage. (Example: You cannot move to doing a reference check on a candidate that has been interviewed by telephone, until all telephone interviews are completed. This assures that all candidates are provided the same opportunity in the competitive process).

Conducting Telephone Screening Interviews

Conducting telephone interviews with applicants can help committees learn more about the applicant than can be gleaned from written materials. To conduct telephone interviews with applicants, the committee should:

- Have at least two committee members participate in the telephone interview, but the more committee members who can attend the better.
- Develop a list of questions to ask during the interview. These questions must be related to the job and should follow the guidelines for [Permissible/Impermissible Inquires](#).
- Limit the number of questions to 5-7 open-ended questions so applicants have an opportunity to engage with the interviewers. Use the questions to address any concerns about the candidate's background or qualifications which may have been discussed with the committee.
- Send the interview questions to Human Resources | Affirmative Action for preapproval. Human Resources | Affirmative Action reviews questions for job validity and for potential discriminatory elements.
- Conduct the interview. Take and retain careful notes. Watch personalized notes such as "has kids", "just married, wants to move to Montana"; "divorced, starting over"; "empty nest syndrome"; "wants to get back in the work force", etc. While the applicant may volunteer this information, the information gleaned on the note taking could be construed to indicate familial, marital and age discrimination, just by writing down these comments. Keep notes specific to the job related answers.
- Share the results of the telephone interviews to the committee, ignoring any information which is not job related.

Conducting Telephone Reference Checks

Telephone reference checks allow committees to ask specific questions and learn directly relevant information about a candidate's qualifications, strengths and weaknesses. Committees should check references provided by the applicant

and must check the same number of references for all applicants under consideration at the same stage of the search process.

To check references through a telephone interview, the committee should:

- Develop a list of questions to ask the references. In developing the questions, committee members should refer to the job duties and the successful candidate will language on the vacancy announcement for the qualities, skills and abilities that are most critical to the applicant's success.
- Limit questions to no more than 5-7 questions for an interview so referees have a chance to explain their responses and engage with the committee.
- Send the questions to Human Resources | Affirmative Action for preapproval. Human Resources | Affirmative Action reviews questions for job validity and for potential discriminatory elements.
- Call the reference. At least two members of the search committee should participate in any conversation with a referee. One committee member should ask the questions and lead the interview. Both should take careful notes on what was said in response to the questions.
- Report the results of the reference call to the committee, disregarding any information which is not job related.

Campus/Finalist Interviews

There is no required number of individuals who must comprise the finalist pool.

The chair of the search committee or the hiring authority must submit the names of finalists to Human Resources | Affirmative Action to verify diversity of the total applicant pool and for any protected class members.

The interview stage of the search process should:

- Assess the candidate's interactive skills, decision-making style, and other attributes described in the "Successful Candidate Will" section of the vacancy announcement.
- Observe and evaluate the candidate's performance in job-related situations.
- Explain key aspects of the duties, terms and conditions of the job.
- Answer candidates' questions and address their issues and concerns about the position and the University.
- Conduct verification checks (i.e. education, employment) on candidates as requested by the hiring authority.

Note: Candidates for tenurable faculty positions involving classroom teaching or distance learning must be given the opportunity to demonstrate their teaching abilities. The candidate should teach a section of a class or seminar or have the opportunity to demonstrate her or his skills using educational technologies.

In addition, all "stakeholders" in a position should be invited to participate in the interview process and should receive [feedback forms](#) so they can communicate their evaluations of the candidates to the search committee.

Feedback Forms

The committee should develop feedback forms for persons who are not members of the search committee to use to evaluate the candidates. [Click Here for Sample Feedback Form](#).

Search committees should provide feedback forms at every meeting or public forum. Since students and/or clients must be involved in evaluating the teaching abilities of any faculty member who will have classroom instruction responsibilities, their evaluations are especially important.

Committees should evaluate the feedback and tabulate data for inclusion in the committee's final recommendation.

Evaluating Teaching Ability

When teaching is a responsibility of a position, the committee and the hiring authority must give candidates the opportunity to demonstrate their teaching abilities and their ability to apply new instructional technologies and active learning methods. Such opportunities might include lecturing to a class, presenting a seminar, demonstrating distance learning techniques, or modeling clinical techniques.

Cost of Interviewing

The department is responsible for paying the costs of interviewing candidates, including travel, lodging and meals. In cases where an interviewee is out of the country, the candidate is responsible for getting to the U.S. mainland; the department pays the travel expenses from the entry city to Bozeman.

Interviewing Candidates with Disabilities

All applicants or employees, including those with disabilities, are expected to be able to perform the essential functions of the position or program, with or without reasonable accommodation. It is the responsibility of the person with a disability to request an accommodation in the interview process.

One purpose of the employment interview is to assess each candidate's ability to do the job. The ADA limits the types of questions employers can ask. The hiring authority may ask about any need for accommodation or may ask candidates to demonstrate how they would perform specific tasks, provided:

- The hiring authority asks all candidates the same questions or requires all candidates to perform the same demonstration; or
- There is a reasonable basis, because of a candidate's obvious disability, for the hiring authority to believe that the candidate will need accommodation; or
- The hiring authority believes a candidate will need an accommodation because the candidate has made her disability known; or
- The candidate has voluntarily disclosed that he will need an accommodation.

In such cases, the hiring authority may ask a candidate:

- If s/he can perform essential functions of the position with or without accommodation, and
- How s/he would perform the essential tasks and with what suggested accommodation.

Contact the Office of Human Resources | Affirmative Action if an accommodation request is made that the hiring authority does not feel comfortable making the decision.

Confidentiality/Release of Finalist Information

The names, qualifications and status of applicants in the search process are confidential and should not be discussed by anyone who is not on the search committee or part of the search process.

When finalists have been contacted and have accepted interviews, their names and resumes (abbreviated resumes is preferred) become public information and may be released to the campus community, the public and the press. Committee members should remove any personal identification of the candidate when sharing resumes (i.e. mailing address, personal email, etc)

The names of applicants who were not selected for interviews are not public information and should never be released.

Narrative Summary Reports

Human Resources | Affirmative Action provides a [Search Summary Narrative](#) for committees for continuity and consistency in the search process. This form should be completed and sent to Human Resources | Affirmative Action prior to any offer of employment being extended. [Contact the Human Resources | Affirmative Action office for the Search Summary Narrative](#). The purpose of the report is to share as complete and inclusive an analysis of the candidate's strengths and weaknesses as possible. Thus, committees should include the assessments and feelings, both positive and negative, of all the members of the committee in the report.

Ranking of Candidates

If the hiring authority has specifically asked for a ranked list of candidates, then the committee should provide such a list. However, Human Resources | Affirmative Action recommends that committees not submit a ranked list unless specifically requested to do so by the hiring authority.

Ranking of candidates often times results in dissension amongst committee members because it forces a vote or a consensus rather than a narrative recommendation. This dissension can not only drive a wedge between committee members, the ranking almost always leaks out to the eventual hire and appears as a negative: "I don't know how you got the job. You were ranked fifth by the search committee."

Committees can avoid doing such harm by not ranking candidates and by remembering that, although crucial, their recommendations are advisory.

Committee's Report to the Hiring Authority

Once the interviews have been conducted, the search committee should evaluate all candidates and make its recommendations to the hiring authority, in accordance with its initial charge.

The committee report should include the following:

- Determinations as to which candidates are acceptable and/or unacceptable,
- Assessments of the strengths, weaknesses and potential areas of concern of each candidate,
- Summaries of the feedback received from non-committee evaluators, and
- Summaries of the discussions about each candidate, including mention of dissenting opinions.

At the conclusion of the search process, the Committee Chairperson or designee should ensure that applicants are notified of the status of the search process and should notify all finalists the search is closes. [Sample letters are here.](#)

Record Keeping of Search Documents/File

The search support or Committee Chair assembles a complete file on the search including all applications, minutes of committee meetings, screening instruments and interview questions, reference checks, interview evaluation sheets from committee members, [Search Summary Narrative](#) and feedback sheets from University faculty, staff, and students. This complete file is retained for three (3) years from the date of hire. A summary file containing the position description, the new hire's curriculum vitae or resume, the vacancy announcement, the final report of the committee, the letter of appointment or letter of hire, and the Search Summary Narrative of the search process should be retained for three (3) additional years.

The department places a copy of the position description, letter of hire or letter of appointment, and curriculum vitae or resume in the new employee's departmental personnel file.

[Screening Matrix](#)

[Permissible and Impermissible Inquiries](#)

[Sample Search Status Letters](#)
