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# Introduction

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This Handbook presents a general overview of the recruitment and hiring processes used at Montana State University (MSU) to hire contract professionals and faculty employees. The Handbook references policies of the Montana Board of Regents and Montana State University. If there are any omissions, misstatements or inconsistencies between this handbook and these policies, the policies take precedence.

## Exceptions by the President

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The President may approve exceptions to the hiring procedures outlined herein, on a case by case basis, when necessary for the efficient administration of the institution.

## EEO Opportunity in the Hiring Process

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The University guarantees **equal opportunity** in the hiring process by:

- placing vacancy announcements and advertisements in electronic and appropriate recruitment sources as appropriate to the position;
- stating MSU's equal opportunity commitment in the vacancy announcements and advertisements;
- appointing committees to review, interview, and evaluate applicants;
- conducting fair and impartial evaluations of candidates; and
- studying applicant flow statistics to ensure there is no adverse impact on protected class applicants.

The University takes positive, effective **affirmative action** to increase opportunities for protected class applicants for positions by:

- ensuring that approximately 25% of the members of search committees are women and/or representatives of diverse populations as appropriate;
- advertising positions in enhanced recruitment sources as appropriate to the position;
- ensuring qualified protected class finalists are interviewed; and
- requiring justification if protected class finalists are interviewed but not hired.

## Brief Overview of the Recruitment and Hiring Process

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### Pre-Search

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- The hiring authority prepares the position description. If the position description has not been updated for several years, the position description should be reviewed and revised to reflect an accurate description of the duties and responsibilities.
- The position description is submitted to Human Resources | Affirmative Action for review and approval.
- The hiring authority submits the [Recruitment Authorization Form](#) (RAF) to the appropriate Vice President or Provost for approval.
- The search committee and/or the hiring authority develops a vacancy announcement based on the position description. A vacancy announcement template can be accessed at the [HR|AA Search Committee Tools website](#).

- The hiring authority or committee sends the Office of Human Resources | Affirmative Action the vacancy announcement electronically for posting purposes.
- The Office of Human Resources | Affirmative Action posts the position on the MSU Job Webpage and appropriate on-campus bulletin boards after receiving the signed RAF.
- The Office of Human Resources | Affirmative Action sends an email to the hiring authority and/or search chair advising them of the search number and other administrative search procedures, requirements and responsibilities.
- The hiring authority appoints the search committee and the search committee chair and the hiring authority invites a representative from Human Resources | Affirmative Action to orient the search committee prior to screening the applications. The Hiring Authority should write or verbalize a charge to the committee.
- A search support position may be assigned to the committee. This position will perform administrative duties such as arranging committee meetings; collecting applications; processing applicant correspondence as directed by the committee chair; committee file recordkeeping, etc.

## Recruitment

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- The search committee advertises the position in required and enhanced recruitment sources appropriate to the type of position and level of the search. [Click here for enhanced recruitment resources](#).
- The search committee develops application screening instruments, telephone reference questions, and telephone interview questions to be used in the evaluation of applicants and submits these to Human Resources | Affirmative Action for approval.
- The search support and/or search chair sends [Human Resources | Affirmative Action](#) the email addresses (names and street mailing address if no email is provided) of all applicants as they are received.
- The Office of Human Resources | Affirmative Action sends EEO letters requesting demographic data to applicants in electronic format.

## Screening

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- The search committee independently screens applications after the screening date, using the [approved screening instruments](#) and determines who meets required qualifications and preferred qualifications.
- The search committee continues the screening process by 1) conducting telephone interviews and 2) completing reference checks.
- The Search Chairperson should work with the Office of Human Resources | Affirmative Action in establishing if there are protected class members in the applicant pool and if these members are being considered through the search process.
- The search committee establishes its finalist pool and discusses the finalists with the hiring authority. *The [University's Affirmative Action Plan](#) requires qualified protected class members in the finalist pool to be interviewed; other finalists are approved for interview as appropriate.*
- The hiring authority or committee chair informs the Office of Human Resources | Affirmative Action of the names of finalists, learns of any protected class members in the applicant pool and obtains Human Resources | Affirmative Action concurrence to invite candidates for interviews

## Finalist Interviewing

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- The committee chair invites finalists for interviews and may publicly announce the names and qualifications of finalists if appropriate. The chair should personally call any "internal" applicants who are not included in the interview pool.
- The committee develops interview questions and [feedback sheets](#) based on the qualifications identified in the vacancy announcement.

- The committee, the chair, and the hiring authority develop the schedule for on-campus interviews ensuring that all applicants experience “the same or similar” experiences.
- The hiring authority, committee chair and committee members, as well as appropriate administrators and constituency groups, interview candidates. It is required to provide [feedback tools](#) to these groups to ascertain comments.
- The committee summarizes the feedback, evaluates candidates, and summarizes the search process and presents this to the hiring authority as to the acceptability, strengths, and weaknesses of the candidates. Ranking of candidates is discouraged. [Use of the Search Summary Narrative template is recommended. Contact Human Resources | Affirmative Action for template.](#)
- The summary document should be submitted to Human Resources | Affirmative Action for approval.

## Hiring

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- The hiring authority and/or committee chair may collect additional information and may contact additional references on the finalists.
- The hiring authority obtains concurrence to make a conditional offer to a candidate from Human Resources | Affirmative Action and appropriate Dean, Vice President or the Provost’s Office.
- If a protected class member was interviewed but was not selected, the hiring authority writes a letter of rationale as to why the person was not selected.
- The hiring authority or designated staff member will contact the person selected and will notify Human Resources | Affirmative Action of the verbal acceptance of the position. Human Resources | Affirmative Action will initiate the pre-employment background check. **All job offers are conditional upon successful completion of a pre-employment background check.**
- The hiring authority may negotiate terms and conditions of employment with the candidate, including rank, tenure credit date, hire date, salary, condition of hire, start-up packages, and moving expense reimbursement consistent with university policies and any applicable provisions of the applicable collective bargaining agreements.
- Once the background check results are received, the hiring authority finalizes the formal letter of hire or letter of appointment, obtains all appropriate signature approvals, and sends it to the candidate for signature.
- The hiring authority or committee chair notifies unsuccessful interviewees and informs the committee and appropriate administrators of the hiring.

## Record Keeping

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- 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, 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 in the appropriate Department or College 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 (if available), vacancy announcement, letter of hire or letter of appointment, and curriculum vitae or resume in the new employee's departmental personnel file.
- The department head gives the new tenure track faculty member a copy of, or the link to, the department's and/or college's P&T document.

# Chapter 1: Pre Recruitment Considerations

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## Guidelines for Establishing a Salary Range for the Position

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### Tenurable Faculty Positions

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The University has negotiated certain salary floors for tenurable faculty members as part of the collective bargaining agreement. Hiring authorities may not pay tenurable faculty less than the applicable floor by rank. [Click here for faculty salary floors](#).

### Nontenurable Faculty

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The University has negotiated certain salary floors for non-tenurable faculty members appointed at .50 FTE and above as part of the collective bargaining agreement. Hiring authorities may not pay non-tenurable faculty less than the applicable floor by rank. [Non-Tenure Track Faculty CBA, Section 10.02](#).

### Research Faculty and Research Professionals

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The University has established salary guidelines based on the Fair Labor Standards Act (FLSA) overtime exempt wage requirements and modified for the type of research position. Hiring authorities must pay 1.0 FTE research faculty and research professionals the salary floor listed [here](#). Employees hired at less than full time are not exempt from overtime and if they work over 40 hours per week, they are eligible for overtime.

Hiring authorities may consult the discipline and rank based salary data provided in the [OSU Salary Survey](#) to assist in setting an appropriate salary for the position.

### University Executive, Administrative and Contract Professional (Non-Research) Positions

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The University does not have established salary floors for University Executive and Contract Professional positions. Hiring authorities should consult CUPA Salary Surveys for data on comparable salaries across other higher education institutions.

[http://www.montana.edu/opa/restricted/faculty\\_salary/08-09MidPosted.pdf](http://www.montana.edu/opa/restricted/faculty_salary/08-09MidPosted.pdf)

The hiring authority may not offer a starting salary that exceeds the average salary for comparable positions at peer universities without the approval of HR|AA.

## Types of Appointments and Titles

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### Executive and Administrative Appointments

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University Executives are hired on Board of Regents Contracts with titles that indicate the senior level of responsibility of the position, including:

- President
- Vice President
- Provost
- Vice Provost
- Legal Counsel

## Administrators

University administrators are appointed on Montana University System Employment Contracts with titles that indicate their level of responsibility, including:

- Deans
- Assistant and Associate Deans
- Tenurable Faculty
- Executive Directors
- Assistant and Associate Vice Presidents

## Research Professional Positions and Titles

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Research employees are 100% grant funded and appointed on Letters of Appointment (LOA). Appointments are subject to the availability of funds. If funding becomes unavailable or is not sufficient to support the position, the appointment may be terminated before the expiration of the contract as outlined in the LOA.

Research appointments are for a specified term and expire automatically without notice at the end of the LOA term, unless renewed prior to expiration. There is no continuing right to reappointment to any research appointment and reappointment is solely at the discretion of the University.

Approved titles for research professionals include:

- Research Scientist
- Senior Research Scientist
- Research Engineer
- Senior Research Engineer
- Postdoctoral Research Associate
- Research Associate

## Contract Professional Positions and Titles

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A contract professional employee is a non-classified, non-faculty, non-executive employee appointed on a MUS Employment Contract approved by the Commissioner of Higher Education or a MSU Letter of Appointment. A position may be denoted as a contract professional position only if it meets the criteria established by the Board of Regents. [[See Board of Regents Policies, Section 711.1](#)] HR|AA will designate those positions appropriate for contract professional contracts. [Contact Human Resources | Affirmative Action for approved titles of contract professional positions.](#)

## Professional Hourly Appointments

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Professional hourly appointments require pre-approval by Human Resources | Affirmative Action. The request to hire a professional hourly appointee is available [here](#).

Professional Hourly appointees are temporary employees who have met the FLSA criteria for overtime and Union exemption and who are employed on a temporary basis to fill short term needs which are not expected to be recurring or for which the hours needed are unpredictable, varied, or infrequent.

In general, a professional hourly appointee is someone who:

- Earns no less than \$12.00 per hour; and
- Is anticipated to work no more than 10 hours in any week; and



- Works on call, with no expectation of continuing assignment.

The hourly wage must be commensurate with the position and may not exceed the average CUPA wage for comparable positions at peer institutions doing the same or similar work.

#### Limitations of Professional Hourly Appointments

Temporary professional hourly appointments (short term workers) are subject to the following limitations:

- The employee must be paid an hourly wage; and
- The employee may not be hired into another position by the same department without a competitive selection process; and
- The employee is not eligible to earn leave and holiday benefits; and
- Due to the varied work schedules, the employee should not work more than 40 hours in any week. However, if they do, they will be eligible for overtime; and
- Appointment to a temporary, professional hourly appointment may not be added to another appointment to make the employee eligible for paid holidays, health insurance, annual leave, or retirement benefits.

A temporary professional hourly employee is hired using an [Electronic Personnel Action Form](#) (EPAF).

#### Criteria for meeting Professional FLSA Status

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All executives, faculty, contract professional and research employees must meet the federal Fair Labor Standard Act criteria, Montana overtime exemption criteria and MSU criteria.

In addition to meeting the FLSA criteria for overtime exemption requirements for a “professional” or “administrative” position, the employee in a contract professional’s position should be commonly associated with the management and administration of colleges and universities in the United States as identified in the Position Descriptions section of the [CUPA-HR Mid-Level Administrative and Professional Salary Survey](#) and must:

- Perform specific, identifiable functions that are autonomous in nature; **and**
- Execute, under only general supervision, assignments and tasks, that are specialized or advanced in nature and establishing policies or directives for the unit; **and**

In addition, contract professionals must meet one of the following MSU specific criteria:

- The employee reports to an executive or administrator (President, Provost, Vice President, Vice Provost, or Executive Director) and works directly with the policies, general business operations, or budgets of the institution as a whole or of a significant, customarily recognized subdivision thereof, **or**;
- The employee reports to and directly expedites or implements the work of a University Executive, Dean, or managing or grants and contracts director in the administration of the University as a whole or of a college, division, department, or other subdivision of the institution, **or**;
- The employee works directly with management policies, general academic or business operations, or the budget of a division, college, or major subdivision of the University, **or**;
- The employee develops curriculum, instructional or educational assessment materials, has responsibility for curating a major museum, scientific or artistic collection, **or**; transmits technical or specialized information to the general public through distance learning technologies, workshops and seminars, and other forms of technology transfer, **or**;
- The employee is certified or licensed to provide treatment for students’ mental, physical, and emotional health and well-being, **or**;

- The employee is an artist, actor, musician, accompanist, film or television director, or other Fine Arts professional whose work is original and creative in character, and the result of which depends primarily on the invention, imagination or talent of the employee, **or**;
- The employee conducts independent research under minimum supervision, frequently developing research protocols, supervising the work of others, and reports the results of research in publications and presentations, **or**;
- The employee is a coach or assistant coach of an intercollegiate sport or competitive activity sponsored by the Bobcat Athletics.

The employee is responsible for (IT related exceptions):

- developing information technology (IT) policies, resources and protocols across institutions, across the MUS system, or within the institution as a whole;
- supervising and administering IT resources, interactions, protocols and data management requirements for colleges or major subdivisions of the institution;
- planning and implementing long term, enterprise-wide hardware, soft ware, fiber optic, and WIFI acquisitions, operations and systems;
- monitoring and maintaining data integrity systems and ensuring system security, **and/or**;
- designing and instituting IT systems, cooperative agreements, and connectivity protocols that implement research goals, share data and enable scientific research and analysis.
- The employee should have only minimal responsibility for day to day technical operations or solving user initiated problems. In addition, the employee usually has supervisory responsibilities over other IT staff and/or joint reporting responsibilities to both a senior administrator and the ITC director.

## Chapter 2 - Search Committee Responsibilities

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### Search Committee Confidentiality

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All persons engaged in the search process, including the hiring authority, search support staff, members of the committee, and others involved in the screening and evaluation of applicants must ensure that they do not, intentionally or unintentionally, share information about the search with unauthorized individuals or transmit information obtained from unauthorized sources to the search committee.

The following principles of confidentiality should be maintained:

- The names and vitas or resumes of applicants are kept confidential and released only to the hiring authority and HR|AA until the finalist stage. The names and curriculum vitae or resumes of candidates who have been offered and accepted a finalist/on-campus interview are not confidential and may be released to the public.
- The findings of any interview process are confidential and should not be shared with other staff members, departments, etc.
- The specific evaluation instruments and questions to be used in the applicant screening process are confidential as are any evaluation scores, ratings, descriptions or notes about an applicant.
- An applicant's named references may be contacted at any time during the search process without so informing the applicant, unless the committee has indicated in the vacancy announcement that it will contact the applicant before calling references.
- An applicant's named references may be contacted at any time during the search process without so informing the applicant, unless the committee has indicated in the vacancy announcement that it will contact the applicant before calling references.
- If a search committee decides it wishes to obtain information about an applicant from someone who is NOT listed on the applicant's list of named references before on-campus interviews, the search committee chair or designee must call the applicant to obtain permission to contact that reference. If a finalist is invited to campus for an interview, the committee may contact references not listed by the candidate if they are supervisors, department heads or other persons who have had a professional relationship with the candidate.
- The hiring authority, the chair of the search committee, and the HR|AA Director are authorized to speak to the public about the status of a search. Other persons wishing to speak to the public about a search must first obtain permission from the search committee chair and/or hiring authority.

Violations of the confidentiality of the screening process, if identified and confirmed, may result in corrective and/or disciplinary action including but not limited to canceling the search and removing a member from the search or screening committee and may not participate in the screening interviews (phone and reference) conducted on the applicant.

### Conflicts of Interest

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All parties involved in the search process are expected to exercise good judgment in situations where a conflict of interest may be perceived to exist because of close professional relationships such as having served as an applicant's graduate advisor, having co-authored articles or proposals with an applicant, or having previously hired and/or supervised an applicant. In most cases, if a committee member knows an applicant well or has had more than casual dealings with an applicant, the committee member should either resign from the committee or recuse himself or herself from reviewing that applicant's materials.

## Executive/Vice President/Vice Provost Responsibilities

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- Serves as the Hiring Authority and ensures the hiring process is in compliance with policies/procedures. Signature authority on [Recruitment Authorization Form](#) (RAF).
- Reviews and approves the Search Committee composition to assure diversity is balanced by gender, ethnicity, and other diverse representations. If the Search Committee composition can be diversified by the appointment of additional members, such appointments may be made.
- Reviews and approves [vacancy announcement](#) to ensure that minimum qualifications do not screen out or discourage qualified women, minorities, or members of underrepresented groups.
- Consults with Department Head/Administrator/ Dean and the Office of Human Resources | Affirmative Action when an insufficient number of applications is generated from women and minorities (depending on discipline and availability) to determine if: a) the deadline for applications is to be extended; b) the search is to be cancelled and initiated at a later date; c) the search process is to proceed with the pool of applications received; or, d) consultation with the Provost is needed.
- Ensures that Affirmative Action efforts are considered throughout the search process and in the choice of a candidate to whom an offer of employment is made.
- Approves, or assignees appropriate designee to approve, the list of unranked finalists to be invited for on-campus interviews, as provided by the Search Committee Chairperson.
- Ensures that it is expressed that the offer of employment is conditional on successful completion of a pre-employment background check.
- Signs the official employment contract to the successful candidate in a timely manner. Negotiating factors such as salary, relocation expenses, and start date, are mutually agreed upon with the Department Head/Administrator/ Dean prior to the preparation of the letter. The verbal offer may be delegated to the Department Head/Administrator/Dean or other designee.

## Department Head/Administrator/Dean Responsibilities

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- Completes the [Recruitment Authorization Form](#) (RAF) and processes the RAF with one copy of the proposed vacancy announcement and a copy of the proposed newspaper/journal advertisements either “on line” or in hard copy (if developed at this stage). The Department Head/Administrator/Dean is ultimately responsible for the preparation of the vacancy announcement, but may consult with the Search Committee.
- Discusses a budget for advertising, travel, and related expenses with appropriate personnel.
- Insures advertising media and other recruitment efforts are targeted to sites where women, minorities, and underrepresented groups are available (i.e., special interest group newsletters, mailing lists, list serves, peer institutions, etc.).
- Appoints a Search Committee Chairperson. Tenured faculty may be appointed to the Chairperson position for tenure-track faculty positions and some administrative positions (i.e., Dean, Vice Provost, and other positions of similar responsibility). There may be occasions when tenured faculty from other departments may be appointed to the Chairperson position due to limited availability of tenured faculty in small departments.
- Appoints members of the Search Committee.
- Assures that the Search Committee Chairperson schedules an orientation with the Office of Human Resources | Affirmative Action during the first or second meeting.
- If serves as hiring authority for the position, briefly presents any instructions (i.e., Search Committee charge, position requirements, etc.) to committee members during the first committee meeting. The Department Head/Administrator/ Dean may be invited to subsequent meetings by the Search Committee to answer specific questions. The Department Head/Administrator/ Dean disengages himself or herself from the search process following initial instructions and reenters the process after the committee forwards recommendations.
- Informs departmental clerical staff or search support of appropriate procedures for handling and forwarding of applications to the Chairperson.
- Consults with the Executive/Vice President/Vice Provost and the Office of Human Resources | Affirmative Action in a timely manner when: a) the candidate pool surfaces only one qualified candidate; b) problems regarding the

search process are reported (including disagreements over the list of finalists); or, c) other extenuating circumstances warrant intervention.

- May conduct additional reference checks on finalists to be interviewed in addition to those completed by the Search Committee.
- If the Department Head/Administrator/Dean serves as the hiring authority for the position, they approve the list of unranked finalists provided by the Search Committee.
- Any conditions of employment (i.e., moving expenses, contingency agreements, tenure-track effective date, etc.) are confirmed with the Dean/Executive/Vice President/Vice Provost prior to the preparation of the offer letter.
- Confirms that all candidates interviewed are notified the position has been filled as soon as possible after acceptance from the successful candidate.

## Search Committee Chairperson Responsibilities

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- Assists the Department Head/Administrator/Dean with the selection of Search Committee members if requested.
- Informs the Department Head/Administrator/Dean of the composition of the candidate pool upon accessing this information from the Office of Human Resources | Affirmative Action.
- Schedules an orientation with the Office of Human Resources | Affirmative Action and Search Committee within the first or second meeting to review the search process and prior to reviewing application materials.
- Insures that the Office of Human Resources | Affirmative Action is sent applicant contact information as applications are received, for the office to send EEO data requests.
- Meets immediately with the Department Head/Administrator/Dean any time the search process may be compromised due to interference, disputes, etc.
- Schedules and directs all committee meetings, ensures that copies of application materials are delivered to committee members, and maintains a documented record of all meetings. The Search Summary Narrative can serve as a document of this process.
- Serves as the Search Committee spokesperson, dates/logs applications and ensures candidates are informed of their status as soon as possible. It is recommended that at least three references are requested.
- As candidates are being eliminated from the pool, the committee Chairperson sends follow-up letters/forms to applicants at the appropriate time in order to avoid unnecessary duress for the applicant. *Reminder: Do not send de-selection letters to candidates who may subsequently become viable finalists on the occasion that the successful candidate(s) may decline.*
- Ensures the Search Committee actively participates in the interview process and provides feedback. Provides the interview itinerary to candidates scheduled for interview and invited participants in advance of the interview dates.
- Insures that interested faculty, staff, students, and relevant constituency groups have an opportunity to view the finalists' application letters and resumes (excluding list of references and/or reference letters and personal information).
- Arranges travel accommodations for each candidate to be interviewed on campus and prepares an interview itinerary that identifies committees/community organizations, and names and titles of individuals participating in the on-campus interview. The search support person may arrange as delegated by the Chair. The interview itinerary should be made available to candidates and invited participants prior to scheduled interviews.
- Completes the [Search Summary Narrative](#) for administrative review and presents the Search Committee's assessments of finalists' strengths and weaknesses, based on documentation reviewed, to the hiring authority. In cases when the candidate pool surfaces only one qualified candidate, a written justification to the Department Head/Administrator/Dean and the Office of Human Resources | Affirmative Action may be required.
- Collects all records from Search Committee members and forwards to the appropriate Department or College office for recordkeeping

- Secures and retains Search Committee records (i.e., vitaes, Screening Records, RAF, letters of reference, recommendation memorandum) for a minimum of three years from the date of hire.

## Search Committee Membership

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- The Department Head/Administrator/Dean confers as to who will be represented on the Search Committee. Search Committee members should have a legitimate interest in the selection process. For example, in the selection of a faculty member, it is advantageous to include department tenured faculty. For non-academic administrative positions, persons who will be subordinates, peers, and/or superiors of the person selected may serve on the Search Committee. When a Dean/Executive/Vice President/Vice Provost of a university is sought, it is customary to include subject matter specialists as well as prospective peers and supervisors.
- Every effort should be made to balance the Search Committee with members of underrepresented groups. Search Committee members may include individuals outside the department based on area of expertise to ensure that diverse populations are represented on the committee. Faculty members may serve on Search Committees for academic administrative positions. The committee members may be nominated and elected for this specific purpose.
- On occasion, individuals outside of the university may be appointed to the Search Committee. For examples, a local attorney may be appropriate for selecting a faculty member to teach Business Law.
- A search support person may be assigned to the committee to perform administrative duties related to the search.

## Search Committee Member Responsibilities

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- Committee members will screen applications and determine if an applicant meets minimum qualifications. The committee chairperson may assign a subcommittee of at least three committee members to conduct the initial screening for searches with a large number of applicants with the approval of HR|AA.
- Agrees to comply with the university's commitment to Affirmative Action program goals and objectives throughout the search process.
- Attends the Human Resources | Affirmative Action orientation meeting prior to screening applications. Search committee members should not begin screening of applications prior to orientation meeting. If unable to attend, the committee member will contact the Search Committee Chairperson for information from the meeting.
- May assist with writing the [vacancy announcement](#) (if requested by the Department Head/Administrator/Dean and/or through the Chairperson).
- Attends all meetings scheduled by the Chairperson to the greatest extent possible. In the event of a scheduling conflict, the Chairperson will be notified.
- Assists in establishing a timetable for the search process.
- Determines the most effective recruitment resources and advertises positions appropriately.
- After the screening date or fixed deadline has passed, the Search Committee members independently screen the applications to assure the required documents are received and evaluates qualifications according to the required and preferred qualifications and other relevant criteria defined in the vacancy announcement.
- Develops interview tools to be utilized in the process.
- Conducts screening interviews to include telephone interviews and reference checks and reports the findings back to Chairperson and Committee.
- Assists the Chairperson with travel accommodations, interviewing schedules, preparation of letters, etc., when requested.
- Participates actively in several sessions on the interview schedule for the same candidate to observe the candidate in different settings.
- Search committee members should remember that committee recommendation(s) is/are advisory. The hiring authority frequently sees the needs of the department, the requirements of a position, or the strengths of a

candidate differently than do members of the search committee. The hiring authority makes the hiring decision based on his or her own analysis as well as on the committee's recommendations.

- In making their recommendations, committees should look for patterns of strengths and weaknesses in a candidate and assess her or his ability to contribute to the needs of the department and the University, rather than relying on effusive praise or negative comments from a single reference.
- Assists the Chairperson with the preparation of an unranked list of the best qualified finalists. ***It is not the committee's responsibility to select the final candidate.***
- Forwards all records and documents to the Committee Chairperson after the search process is completed.

## Office of HR|AA Responsibilities

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- Monitors the search process for compliance with the university's Affirmative Action program and MSU Policy and Procedures.
- Sends EEO Data requests to applicants and monitors the return of the information.
- Reviews and approves the RAF, proposed vacancy announcement and, if submitted, proposed newspaper and/or journal advertisement(s).
- Posts the positions on the MSU Job Website and posts on appropriate bulletin boards on campus.
- Provides the Search Committee with the number of women and minority applicants in the pool who have self identified.
- Advises the Provost and appropriate offices of any exceptions.
- Conducts Search Committee orientations for all positions.
- Conducts an EEO review of applications when a position is in an underutilized job grouping and the person recommended for appointment is not a member of the underutilized group.
- Serves as contact person for conflict of interest matters and renders recommendations for referrals.

## Chapter 3 – Recruitment Process

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### Vacancy Announcement Contents

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The vacancy announcement is based on the position description, but its purposes are different. The position description describes the duties and responsibilities of the position in detail but does not contain information about the application process itself. The purposes of a vacancy announcement are to stimulate interest in the position and in MSU and to tell potential applicants how to apply. The vacancy announcement template is located on the [Search Committee Tools website](#).

### Required and Preferred Qualifications

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Required and preferred qualifications should be “objective” and must be able to be evaluated on written materials alone.

The required qualifications for a position are those minimum education and experience expectations an applicant must meet to be considered eligible for the position. Required qualifications ensure that any applicant who becomes a qualified candidate is competent to assume the position.

The University has established the following minimum requirements for Board of Regents executive, Montana University Systems Contract professional, contract professional and faculty positions:

- Board of Regents executive positions requires significant academic and/or administrative experience that is directly relevant to the rank, duties, and responsibilities of the position.
- Contract professional positions usually require a minimum of a baccalaureate degree from an accredited college or university. In limited circumstances and on a case by case basis and upon approval from Human Resources | Affirmative Action and a record of significant and/or progressively responsible work experience in a directly relevant position may be used as an equivalent required qualification and is listed as such in the vacancy announcement.
- Research professional positions require a minimum of a Master's degree. In limited circumstances and on a case by case basis and upon approval from Human Resources | Affirmative Action, a record of significant and/or progressively responsible work experience in a directly relevant position or a record of significant educational attainment may be used as an equivalent, required qualification.
- Tenurable faculty positions require a terminal degree in the field as determined by the Role, Scope, Criteria, Standards and Review documents of the faculty member's department and college.

The preferred qualifications are those qualifications that exceed the required or minimum requirements, such as a Masters degree in a field. Identifying preferred qualifications in the announcement provides the applicant the ability to include additional education and experience expectations that support their ability to do the job beyond the minimum expectations.

### Height, Weight, Lifting and Driving Requirements

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Position descriptions shall not specify particular physical qualifications such as the ability to lift 200 pounds or to operate heavy equipment unless these are bona fide occupational requirements.

Position descriptions that contain lifting restrictions should use the following language in the position description and vacancy announcement:

- *Candidate must possess the ability, with or without accommodations, to (lift/move/haul/etc) XX pounds...*



Some positions do require an employee to travel throughout the state, and state law requires some employees to possess valid driver's licenses. Use the following language when expressing these requirements.

- *Must possess, or be able to possess, a Montana driver's license or have other means of reliable transportation to travel within the county or state.*

## Years of Experience as a Qualification

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Because it is potentially discriminatory and there is no proven correlation between years of experience and ability, a years-of-experience requirement may not be used as a required qualification. (It may be used as a preferred qualification.)

A description of the level/degree of the competencies must be used instead. For example, specifying "a record of progressively responsible administrative experience" is better than requiring "five years of administrative experience" because it allows committees to evaluate the nature of an applicant's experience rather than counting the number of months someone has been employed.

## Language Proficiency

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Committees and hiring authorities should make no assumptions about the communication skills of any applicant based on his or her nationality or immigration status. Further, a committee that requires candidates to demonstrate a certain level of English proficiency must be able to demonstrate that the position regularly uses that level of communication skill. Language proficiency requirements must be reviewed and approved by Human Resources | Affirmative Action.

## "Successful Candidate Will" (SCW) Statement

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Subjective qualifications, such as "ability to work in a team environment," and qualifications that cannot be immediately and easily accessed from written application materials, such as "excellent oral communications skills," should not be listed as required or preferred qualifications. Rather, these should be elaborated upon in the "Successful Candidate Will" section of the vacancy announcement.

Skills and abilities listed in the SCW section of the vacancy announcement are essential characteristics and qualities on which candidates will be evaluated in the later stages of the screening or search process.

Examples:

- *The successful candidate will demonstrate an awareness of international development issues and the ability to work on a multidisciplinary team.*
- *The successful candidate will have knowledge of the tribes and tribal colleges in Montana, will have excellent interpersonal skills, and will be able to work with people from diverse cultures and backgrounds.*
- [Click here for more examples of Successful Candidate Will](#)

## Listing Salary on the Vacancy Announcement

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Salary is one of the first things a prospective applicant looks at when deciding whether to apply for a position. Including salary in the vacancy announcement usually assures committees that applicants are interested in the position at the salary rate offered. Stating the salary is "commensurate with education and experience" can cause difficulties in the negotiation process. A commensurate salary at one institution may be considerably higher than MSU; therefore, commensurate may not be an option.

This section of the vacancy announcement should also list other status information pertaining to the position such as whether the position is AY, FY, or other; if it is full or part time; if the incumbent accrues health benefits or annual leave and whether the position is tenurable.

## **Application Procedures**

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### *Letter of Application*

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The typical, unstructured cover letter can be remarkably uninformative. A letter of application allows applicants to discuss their philosophies regarding an aspect of the job; therefore the applicant should be directed to address the required and preferred qualifications. If committee members want applicants to submit additional materials such as pictures of their paintings, audition tapes, or published articles, this must be specified in the vacancy announcement.

### *Electronic Submittals of Application Materials*

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Electronic submissions of application materials are highly encouraged, but cannot be mandatory. The committee must consider hard copy applications in addition to electronic submissions. The University currently requires a signed letter of application (either electronic (on the letter) or an original signature) be submitted. At such time the University can accept electronic signatures, this practice may change.

### *References or Recommendations*

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Search committees should require applicants to submit names, addresses, phone numbers and email addresses of 3 or 5 references. The committee can then solicit specific information from the references of candidates in whom they are specifically interested.

Committee members may not act as named references for applicants. If a committee member is asked to be a reference, he or she should recuse himself or herself from the committee to avoid the appearance of [conflict of interest](#).

### *Application Deadlines*

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The committee may establish a fixed deadline which informs potential applicants that the committee will not consider any applications received after the specified date. A fixed deadline is most useful when search committees anticipate receiving a large number of applications. Its disadvantage lies in the fact that a search with a fixed deadline must be re-advertised if no hire is made from the original applicant pool.

If the committee wishes to keep the search open while screening, the search should be "open-ended" with a screening date indicated. A screening date should be identified but applications will be accepted until such time as finalists for the position are identified. Once the screening deadline has arrived, the applicants are screened and any applicant who is evaluated as being equal to or better than the applicants then-currently under consideration should be added to that group and folded into the review process.

### When to Stop Screening

Screening of applications from applicants meeting minimum qualifications can be temporarily halted when the hiring authority and/or the search committee has selected a pool of candidates to interview. However, if the interview process goes on for more than a month, applicants should be sent a letter or post card informing them that the search is still ongoing and they are still under active consideration.

## Recruitment Procedures

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Searches shall be conducted to fill permanent executive, administrative, faculty, and contract professional positions at the University. Searches should be conducted to fill non-permanent positions whenever possible.

### Filling a Position without a Search

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Requirements to conduct searches for non-permanent, non-research positions may be waived under the following, limited circumstances: to meet a temporary staffing need, to fill a permanent position on temporary basis, or to staff a unit during reorganization. In such cases, the hiring authority may hire an individual who meets the qualifications for the professional appointment for up to six months without a search. If the need for a temporary appointment extends beyond six months, the hiring authority should contact the Office of Human Resources | Affirmative Action for guidance.

### Filling More Than One Position from the Same Search

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Multiple hires may be made from the same search, if the positions are the same. The decision to make several hires from the same pool of qualified candidates should be made as early in the search process as possible. If possible, the intention to make multiple hires should be included in the vacancy announcement.

### Affirmative Action Hires

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Requirements to conduct searches for permanent positions may be waived on a case by case basis in order to redress the under-utilization of protected class members in the University's permanent professional and faculty workforce. Only the President has authority to make an affirmative action hire, but he or she should be guided by the results of the following process:

- The hiring authority seeking to make an Affirmative Action hire must make the case, to the appropriate Vice President, the Provost and Human Resources | Affirmative Action, that such a hire will advance the department and the University in achieving its mission, the goals of its 5 year plan, and/or the policies of the Board of Regents in vital ways that likely would not be achieved through a competitive search and that the person considered for the Affirmative Action hire possesses superior, not merely adequate, qualifications for the position.

Human Resources | Affirmative Action permission to initiate an affirmative action hiring process may be granted if:

- the department is determined to be underutilizing women and/or minorities as determined by an current utilization analysis, and
- a qualified protected class member has been identified.

If the request to begin an Affirmative Action hiring process is approved by the Vice President, the Provost and Human Resources | Affirmative Action, the hiring authority writes the position description and appoints a screening committee to evaluate the qualifications and experience of the candidate.

The committee should be composed of a minimum of three members, of whom at least one should be a woman and/or member of an appropriate underrepresented group.

The hiring authority should not serve on this committee, but should write a brief charge to the screening committee giving any special instructions or considerations they should consider in their work.

The screening committee reviews the candidate's submitted materials (curriculum vitae and publications) and makes a recommendation as to the advisability of the Affirmative Action hire to the hiring authority. The committee may

conduct reference checks, phone and on-campus interviews and other screening activities in order to make its recommendation.

The committee submits its recommendation to the hiring authority, who submits it to Human Resources | Affirmative Action, the appropriate Vice President, and the President for approval. If approved, the hiring authority prepares the Letter of Hire and the PTF. If not approved, the hiring authority may consider conducting a search to fill the position.

## Research Career Ladders

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- A Research Scientist or Research Engineer may advance from:

Research Scientist/Engineer, to

Senior Research Scientist/Engineer

through a Career Ladder established in the department and based on department policies.

- Research Engineers must have a Masters or terminal degree in engineering and perform functions generally associated with the profession of engineering.
- Research Scientists must have a Masters or terminal degree in a science field and perform functions associated with scientific research.

A Postdoctoral Researcher may advance to Assistant Research Professor if he or she has applied for and received an externally funded grant or contract as Principal Investigator.

A Research Associate may be advanced to a Research Scientist or Research Engineer if he or she has a record of significant, extensive, and progressively responsible research experience and meets the minimum requirements identified above.

Approval of the Department Head, Dean, Vice President for Research and the Office of Human Resources | Affirmative Action are required for an individual to advance through any one of these research career ladders.

## Recruitment Type and Length of Recruitment Requirements

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A search to fill a vacant position may be conducted on a national, regional, statewide, local or on-campus basis depending on the recruitment area established for the position. Each type of position has a different recruitment area and imposes different requirements in terms of advertising source and length of the recruitment period.

The following list summarizes the required recruitment procedures by overall category of the position.

### *University Executives and Academic Deans*

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University executives are the senior administrators of the institution and are hired on Board of Regents contracts. Deans are the senior administrators of colleges or similar units of the University. Deans are hired on MUS Employment Contracts. Searches for University executives and academic deans may be conducted by hired search firms.

Recruitment Area: National

Type of Committee: Search Committee

Minimum Advertising Period: Six weeks from date of first appearance of the advertisement in a major national print or electronic publication appropriate to the profession.

### *Tenure Track Faculty Positions*

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Recruitment Area: National

Type of Committee: Search Committee

Minimum Advertising Period: One (1) month or four weeks from date of first appearance of the advertisement in a major national print or electronic publication appropriate to the profession.

### *Department Heads*

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(including Department Chair, Director of Schools and Superintendent of an Agricultural Research Center):

Recruitment Area: National search recommended; internal search permitted.

Type of Committee: Search committee required for national search; screening committee required for internal search.

Minimum Advertising Period: One (1) month or four weeks from date of first appearance of the advertisement in a major national print or electronic publication appropriate to the discipline. If the search is internal, ten (10) working days from date of internal announcement/advertisement.

### *Directors (Faculty)*

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(including directors University Honors, University Studies, Montana Manufacturing Extension Center and Center for Biofilm Engineering):

Recruitment Area: Regional recommended; on-campus recruitment required.

Type of Committee: Search committee required for regional search; screening committee required for an on-campus search.

Minimum Advertising Period: One (1) month or four weeks from date of first appearance of the advertisement in a regional print or electronic publication appropriate to the discipline, or two (2) weeks from date of notice for an on-campus search.

### *Non-Tenured Faculty*

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Will follow procedures outlined in the NTT CBA.

### *Affiliate Faculty*

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No recruitment required.

### *Visiting Faculty*

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Recruitment Area: Recruiting is not required but is highly recommended. If the appointment will be for an academic year, or longer, a national recruitment process is highly recommended. Positions should be posted on the MSU Job Webpage.

Type of Committee: None; hiring authority may review applications and make appointments.

Minimum Advertising Period: Two (2) weeks from date of first appearance of the advertisement in a discipline specific recruitment resource or electronic publication.

### *Contract Professionals*

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(including Administrators, Managers and Directors):

Recruitment Area: National search recommended; regional recruitment required.

Type of Committee: Search Committee.

Minimum Advertising Period: One (1) month from date of first appearance of the advertisement in a major national or regional print or electronic publication appropriate to the profession.

### *Academic/Institutional Support Professionals*

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(where in-depth knowledge of University policies, procedures, and protocols are required qualifications including Assistant and Associate Provosts; Assistant and Associate Deans; and Assistant to the Dean, Assistants to the Dean, Academic Advisors and other Student Support Staff; fiscal and administrative and other positions):

Recruitment Area: On-campus recruitment required; regional search recommended.

Type of Committee: Screening Committee required for On-campus search; search committee required for regional search;

Minimum Advertising Period: Two (2) weeks from date of notice for an on-campus search; one (1) month from date of first appearance of the advertisement in a major national or regional print or electronic publication appropriate to the profession.

### *Research Faculty*

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(including Research Professors, Associate Research Professors, and Assistant Research Professor):

Recruitment Area: National

Type of Committee: Search Committee.

Minimum Advertising Period: One (1) months from date of first appearance of the advertisement in the major recruitment publication; concurrent posting on a discipline-specific website is required.

### *Research Scientist/Engineer*

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Recruitment Area: Regional.

Type of Committee: Search Committee.

Minimum Advertising Period: At least three weeks from date of first appearance of the advertisement in the major recruitment publication; electronic posting on a discipline specific website may substitute for advertisement in a print journal.

### *Postdoctoral Research Associate/Postdoctoral Scholar*

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Recruitment Area: National

Type of Committee: None; hiring authority may review applications and make hiring decision.

Minimum Advertising Period: Three (3) weeks from date of first appearance of the advertisement in the major recruitment publication; electronic posting on a discipline-specific website may substitute for advertisement in a print journal.

## Research Associate

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Recruitment Area: Statewide (minimum). Regional or national recruitment is recommended depending on the type of research or discipline.

Type of Committee: None, hiring authority may review applications and make hiring decision.

Minimum Advertising Period: Two (2) weeks from date of first appearance of the advertisement in the newspaper; electronic posting on a discipline-specific website may substitute for print advertisement.

## Pooled Search

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A pool search is a variation of a local search whose specific purpose is to generate a pool of qualified applicants from which one or more hires may be made. Pooled searches generally seek to fill a variety of entry level or temporary positions and usually remain open over several months.

Pool searches for assistant coaches should be advertised in The Bozeman Daily Chronicle and electronically on the NCAA News website at [www.ncaa.org](http://www.ncaa.org).

## Internal (Department/College) Search

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Requires Human Resources | Affirmative Action Approval

An internal search is a search advertised only within a department or college and is open only to current employees of that unit. Each person in the department who is eligible to apply for the position or to make nominations must receive a hard copy of the vacancy or proof of distribution to all employees.

## On-Campus Search

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Requires Human Resources | Affirmative Action Approval

An on-campus search solicits applications from current employees from across Montana State University. The vacancy announcement posted on the MSU Jobs website must specify that applications from non-employees will not be considered. In addition, hiring authorities and/or search committees for such positions must make every possible effort to inform potential on-campus applicants of the availability of the position through MSU Today and other similar methods of distribution to employees. Hard copies of the vacancy announcement should be sent/mailed to all University Departments for posting purposes.

## Advertising Requirements

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### National search

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The position must be advertised in:

- At least one (1) general national recruitment source or a national or international publication relevant to the field.
- National recruitment sources include professional journals, national higher education newsletters, print/electronic newspapers such as *The Chronicle of Higher Education*, and electronic higher education publications such as *Inside Higher Education*.
- Electronic jobs posting websites and other services specific to the appropriate discipline that have national readership may be substituted, on a case by case basis, for advertisement in a general higher education publication.

Go to the [HR/AA Website for additional advertisement information](#) including enhanced diversity based resources that may allow for broader advertisement options.

### *Regional search*

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Requires that the position be advertised:

- At least one time the *Bozeman Daily Chronicle* on a Sunday run, and
- At least one Sunday in at least one regional newspaper.

The hiring authority or search committee may define the "region" as the one most appropriate for the position such as the Salt Lake Tribune, The Denver Post, Portland Oregonian, Seattle Post-Intelligencer and/or Seattle Times and Minneapolis Star Tribune.

### *Statewide search*

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Requires that the position be advertised:

- At least two times in the *Bozeman Daily Chronicle* in Sunday runs;
- In the Sunday editions of at least two Montana newspapers of general circulation;
- Newspapers of general circulation include The Great Falls Tribune, The Billings Gazette, The Missoulian and The Independent Record (Helena).

### *Local search*

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Requires that a position be advertised:

- In the *Bozeman Daily Chronicle* at least three times, of which one must be a Sunday.
- If the position is located away from the Bozeman campus, at, for example, one of the University's Research Centers, at an extended campus, or in a county Extension office, advertisement in the local newspaper where the position resides may be substituted for the *Bozeman Daily Chronicle*.

Positions in which there is a high likelihood of making a hire of a non-U.S. worker should be posted for 30 days with the state Workforce Services Agency.

## **Enhanced Recruitment Efforts**

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Enhanced recruitment involves making an extra effort to inform protected class members of the availability of positions. Montana State University fulfills its affirmative action commitments, in part, through enhanced recruitment of women, minorities, Vietnam era and disabled veterans, and persons with disabilities.

Committees are encouraged report their enhanced recruitment efforts to Human Resources | Affirmative Action and document these efforts in their search files. [Click here for Recruitment Advertising Resources.](#)

### *Enhanced Print Advertising*

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To enhance their recruitment efforts, committees should:

- Place ads or post announcements in publications such as: *Indian Country Today*, *Women in Higher Education*, *Insight into Diversity*, *Diversity, Inc.*, *Society of Women Engineers*, *Modern Language Association (MLA)* and



other magazines and journals specifically targeted to minorities and women. Human Resources | Affirmative Action can provide assistance in determining such sources.

Notify clearing houses, vita or resume banks or other agencies of position openings.

### *"Pre-Interviews" at Job Fairs, Conferences and Professional Meetings*

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Many professional associations encourage employers to recruit potential employees during annual conferences or job fairs. If a University representative meets with potential applicants at a professional conference, he or she must be careful to explain that the meeting is not a formal or screening interview. If appropriate, the University representative should encourage the potential applicant to apply for the position or continue to consider MSU for future employment but should not promise the person an interview or a job.

### *EEO/AA Notice of Compliance in Advertisements*

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Advertisements placed in newspapers or journals for **which a fee is charged** should use the following notice of compliance:

- *ADA/EO/AA/Veterans Preference Employer*

Advertisements in the rare newspaper or journal **that does not charge a fee** to run the ad should use the following notice:

- *ADA/EO/AA/Veterans Preference Employer. Claim veteran's preference or request an accommodation from HR|AA, MSU, Bozeman, MT 59717-2430. (406-994-2042 or hraa@montana.edu)*

### **Failed Search Process**

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When a search does not result in a hire, the hiring authority may:

- Go back into the qualified candidate pool to see if there are any applicants who could be interviewed. These may include those applications that came in after the screening deadline and were paused, **or**
- Cancel the search, appoint a new committee and re-advertise the position, **or**
- Reopen the search by continuing the same committee and, if appropriate, re-advertising the position. A position need not be re-advertised if the search was open-ended and the position is still on the MSU job website.

If a candidate initially accepts and later declines an offer or resigns shortly after being appointed, the hiring authority may seek permission from HR|AA to reopen the applicant pool. Usually, a pool can be considered "active" for six (6) months from the date a hire was made.

### **Terminating or Suspending a Search**

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The hiring authority or the Director of Human Resources | Affirmative Action may **terminate or suspend a search when**:

- Violations of federal or state law, University policy, confidentiality, or the requirements and guidelines outlined in this Handbook have been identified and confirmed;
- The search process has been unreasonably compromised by bias, nepotism, or other prohibited practice;
- There are no legitimate candidates who meet minimum qualifications;
- The committee finds no applicants who meet preferred qualifications;
- The committee finds no interviewee to be acceptable;
- All qualified applicants or interviewees withdraw;

- The incumbent in the position rescinds his or her resignation;
- The department is in the process of reorganization and the hiring authority decides not to fill the position;
- A unit is undergoing an internal or external program evaluation, making hiring premature;
- A new hiring authority prefers to operate with less staffing while reassessing the unit's needs;
- The position to be filled is no longer available, due to reallocation of the position, lack of funds, program reduction, loss of FTE, or financial exigency.

The Director of Human Resources | Affirmative Action will not suspend or terminate a search for procedural irregularities or violation of these policies without first consulting with the hiring authority. If the Director of Human Resources | Affirmative Action decides to terminate a search, the hiring authority may appeal that decision to the President.

## Chapter 4 – Interview Process

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### Screening and Interview Processes

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#### Veteran's Preference in Screening

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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

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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

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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

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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

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### Handling Internal Applicants

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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

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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

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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

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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

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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

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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

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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

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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*

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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*

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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*

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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*

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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*

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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*

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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*

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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*

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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](#)

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[Permissible and Impermissible Inquiries](#)

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[Sample Search Status Letters](#)

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## Chapter 5 – Hiring

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### Changing the Terms and Conditions of a Position after Hire

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Occasionally, a hiring authority will seek to change the status of a position after a hire has been made, usually by trying to change a part-time position to full time or making a temporary or interim position permanent. If the initial search process that hired the incumbent was part time or temporary, the hiring authority will need to do another search to fill the full time or permanent position.

### Exceptions to Approved Salary

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On a case by case basis, Human Resources | Affirmative Action will approve a 10% deviation from the salary amount or salary range approved on the Recruitment Authorization Form, depending on the candidate's experience and qualifications. Human Resources | Affirmative Action will not approve a deviation of more than 10%.

The appropriate Dean, Vice President and the Provost must also approve any deviation from the approved salary range.

### Basic Verification Checks

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A basic verification check confirms the factual aspects, rather than the performance aspects, of a candidate's history. They should always include the following:

#### Verification of Education

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The hiring authority or designee should verify that the candidate earned the degrees or certificates and academic or other honors indicated on the curriculum vitae from each of the institutions indicated. A school may release "directory information," which can include name, address, dates of attendance, degrees earned, and activities, unless the student has given written notice otherwise. [Family Education Rights and Privacy Act](#)

To check whether a candidate earned the degrees claimed, the hiring authority or designee should call the Registrar of the candidate's graduate schools.

#### Verification of Work Experience

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The hiring authority or designee should verify that the candidate worked for the employers indicated and in the positions identified. Oftentimes this is accomplished during the telephone reference check process. Many employers have a policy to confirm only an employee's dates of employment, final salary, and other limited information, but even this can be useful.

To verify a candidate's employment history, the hiring authority or designee should call or write the Human Resources, Personnel, or Employment Records office of the previous employers listed on the candidate's resume.

The person checking background information may not ask a candidate's previous employers about the candidate's disability, illness, or worker's compensation history but may ask about the candidate's work history, titles, previous responsibilities, the quantity and quality of work performed, and other job related issues not related to disability, status as a covered veteran, worker's compensation history or other protected status.

## Verification of Research/Creative Activities

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To check that the candidate has the publications or creative accomplishments indicated in his or her curriculum vitae, use the resources of the MSU Libraries and the Internet.

## Hiring Foreign Nationals

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A foreign national is a person who is not a citizen of the United States or does not have permanent residency status under U.S. law.

Federal immigration law regulates the hiring of foreign nationals by U. S. employers, requiring employers to hire only U.S. citizens, permanent resident foreign nationals and foreign nationals who are lawfully authorized to work in the United States.

## Informing University Offices of an Offer to a Foreign National

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Before extending an offer to a foreign national, the hiring authority should:

- If the appointment is for a graduate teaching assistant, graduate research assistant or postdoctoral researcher, contact the Office of International Programs, 994-4031. This office is authorized to handle H1-B visa certification for students and others on "practical training".
- If the position is for a nontenurable faculty member or contract professional, including a research professional, contact the Office of International Programs. International Programs will assist the foreign national in obtaining the proper H-1 visa.
- If the position is for a tenurable faculty member, contact the Office of International Programs and the Office of Human Resources | Affirmative Action. International Programs will assist the foreign national in obtaining the proper H-1 visa and the Office of Human Resources | Affirmative Action will discuss the labor certification process, if appropriate.

## Labor Certification Guidelines & Procedures

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A labor certification is an action taken by the University to secure the services of a foreign national employee on a permanent basis. It is not an employee right or benefit. Certain positions are allowed labor certifications and these positions require specific recruitment requirements. For more information see [Labor Certification Guidelines](#) or contact the [Office of Human Resources | Affirmative Action](#).

## Obtaining Human Resources | Affirmative Action Approval to Extend an Offer

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Before extending a verbal or conditional offer of employment, the hiring authority must obtain approval to make the offer from Human Resources | Affirmative Action and the Provost, through the Dean, or the appropriate Vice President.

If a protected class member was interviewed but not being offered the position, the hiring authority will be asked to write a justification documenting the specific job-related reasons why the protected class candidate was not selected.

## Pre Employment Background Check

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Montana State University is committed to protecting the security, safety, and health of employees, students, and others, safeguarding the assets and resources of the University, and assuring individuals in responsible positions are worthy of the trust they are given. Pre-employment Background Checks shall be required prior to employing faculty, professional

and classified employees, except as provided [in the Pre-Employment Background Check Policy](#). This policy applies regardless of whether or not a competitive recruitment process is used.

## Releasing Information about Potential New Hires

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It can often be difficult to determine what information about potential new hires can be released and under what circumstance. Generally, the following apply:

- The names and credentials of candidates who have completed the interview phase of the application process and with whom the hiring authority is negotiating a hire are confidential.
- The name and credentials of the new hire are public information and may be announced to the department, University, and the press.
- Although salary is a matter of public record and is made available through the agenda of the Board of Regents, the salary of the new hire may be released to the press or interested parties if specifically requested.
- The current (non-MSU) business address and contact information of a new hire may be released to the University community, the press and local businesses at the discretion of the hiring authority and/or at the request of the new hire.
- The department business address and contact information of a new hire is public information and must be released upon request.

## Moving Expenses

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The hiring authority may agree to pay moving expenses for the new hire. Such agreements should be described in the Letter of Hire or Memorandum of Understanding (MOU). The University may pay moving expenses directly to the provider or may reimburse the new hire for documented expenses.

Before discussing moving expenses with a prospective hire, the hiring authority should consult the MSU moving expense guidelines at <http://www.montana.edu/pps/Taxes/MovingExpenseGuidelines.pdf>.

## Trailing Spouse/Partner Guidelines

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MSU does not have a formal policy requiring a hiring authority to find employment for a trailing spouse or significant other and/or partner. Rather, the hiring authority is encouraged to explore all avenues of potential private and University funding to try to secure suitable employment for that individual. The hiring authority should carefully document all attempts to find such accommodation and may be asked to share this report with Human Resources | Affirmative Action.

## Hiring Faculty Who Lack Terminal Degrees: ABD Appointment

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If the Department and/or College is considering applicants who might potentially be “All But Dissertation” (ABD) this should be clearly identified in the vacancy announcement in the required qualification area. (Example: Required qualification: *PhD in Economics or ABD by hire date.*) You cannot consider an applicant who is ABD in the process unless the position advertises this status will be considered.

If a tenure track faculty recruitment process results in hiring a person who will not have completed the terminal degree by the time of hire, this individual shall be appointed as an Instructor in accordance with the following policy:

Individuals who lack a terminal degree cannot be appointed to a tenurable position.

A person who lacks the terminal degree but who was recruited during a search to fill a tenurable position shall be appointed on a Letter of Appointment as an Adjunct Instructor. The Letter of Appointment shall specify that appointment to the tenurable position is dependent upon the appointee's completion of the terminal degree and will be terminated if the degree is not completed by an agreed upon date.

Upon completion of the terminal degree, the appointment may convert to tenurable status. The tenure credit date shall be the date of the appointment to tenurable position, not the start date of the appointment.

The Letter of Appointment employing the ABD faculty member as "Instructor" shall further specify that:

- The employee will receive salary increases and other benefits according to the terms and conditions of the Letter of Appointment or University policies and procedures affecting adjunct employees.
- The date by which the terminal degree must be completed or the appointment will be rescinded and the position re-advertised.

## Employment Contracts

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### Board of Regents

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University Executives, a category which is limited to the University Presidents, Chancellors, Provosts, Vice Presidents, Vice Provosts, and Legal Counsel, are hired on employment contracts approved by the Board of Regents (BOR). Such contracts imply that the position is a regularly budgeted part of the University's continuing operations.

### Montana University System

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The Letter of Hire should specify the general terms and conditions of the appointment. The hiring authority should use the approved Letter of Hire template. Montana University System (MUS) Employment Contracts are used for regularly budgeted positions that are part of the University's continuing operations and paid from state or continuing institutional funds.

### Letter of Appointment

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See Chapter 1 sections:

[Research Professional Positions and Titles](#)

[Contract Professional Positions and Titles](#)

### Duration of Employment Contracts

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The maximum term of a MUS Employment Contract and BOR Contract is one year. At MSU, unless otherwise specified in the contract itself, the duration of an MUS Employment Contract is from July 1 of one year through June 30 of the following year.