THE UNIVERSITY OF NORTH CAROLINA SYSTEM

UNC System Executive Search Guide

UNC System
Executive Search Services
Updated 2025

Introduction

Thank you for your commitment to the University of North Carolina System (UNC System) by serving on a search committee or as a hiring manager for a leadership position within the UNC System. This guide is intended for search committees and hiring managers responsible for filling executive or other management-level positions in the System that are Exempt from the Human Resources Act (EHRA). The guide explains a recommended search process, offers practical guidance and best practices, and provides links to key resources and documents.

Hiring the right leadership talent is among the most important tasks an institution undertakes. To be successful, hiring managers and search committees should understand their respective roles, responsibilities, and relevant policies. We hope this guide provides you with the necessary information to assist you in the goal of finding highly qualified leaders whose skills, interests, and background match your institution's needs and mission.

Inside this Guide

Governance

The personnel policies that govern the hiring of senior-level employees within the UNC System are set forth in *The Code* and UNC Policy Manual.

- UNC Policy on Delegation of Authority to the President (200.6)
  - Outlines that the UNC Board of Governors delegate to the President of the UNC System the authority to establish and administer a “human resources program” (including positions, salary ranges, recruitment, appointments, salaries, promotion and tenure, leave, discipline, grievances, etc.) for all employees exempt from the North Carolina Human Resources Act (EHRA).
- UNC Policy on Employees Exempt from the North Carolina Human Resources Act (300.1.1)
  - Defines the three types of EHRA employees: (1) Senior Academic and Administrative Officers (SAAO); (2) faculty; and (3) Exempt Professional Staff (EPS).
  - Sets out parameters and conditions with respect to appointments, employment status, compensation, equal employment opportunity, protected activity, etc.

Process Overview

Search Initiation

As soon as a new position is created or a vacancy in an existing position is anticipated, hiring managers contact the Human Resources department to initiate discussions around the job classification, compensation, position description, organization chart, budget, search committee composition, and other relevant recruitment details. An approved position description is required prior to posting and recruiting.

Selection of Search Committee

The hiring manager consults with HR to identify membership of the search committee and designate a committee chair. The use of a search committee strengthens the recruitment process and the identification of the best qualified applicants by combining the experience and professional networks of various individuals that comprise the committee. Search committees also reduce the opportunity for allegations of discrimination and help to protect against accusations of arbitrary or inappropriate applicant evaluation and candidate selection.

Budget

HR and Finance work with the hiring manager to determine a salary range for the position and ensure that proper funding is secured in advance of any posted job opening. The budget should also factor in other search-related expenses such as search consultant fees, ad costs, travel/meeting costs, background check costs, etc.

Designated Search Consultant

A member of the UNC Executive Search Services team serves in a consulting role to the hiring manager and search committee throughout the search. This individual provides guidance, consultation, and facilitation for all aspects of the search, in coordination with the hiring manager, search chair, and any departmental support staff.

Search Committee Kick-off Meeting

Search committee members typically kick off the search with a meeting that consists of:

- Introduction of search committee members;
- An overview of the search process;
- The charge from the hiring manager (in person if possible);
- A review of confidentiality and EEO considerations;
- Description of the duties, responsibilities, and expectations for search committee members;
- Introduction of the designated search consultant to the committee; and
- Establishment of a search timeline and search process planning

Sourcing Candidates

The hiring manager and search chair work with the search consultant to develop a search, outreach, and advertising strategy to ensure a successful and legally compliant search. Additionally, the search consultant helps develop advertising materials such as a position profile.

Screening Candidates

The search consultant reviews all applications as they come in to ensure that candidates meet the minimum qualifications for the job, as set forth in the job description and advertisement. Applicants who do not meet the minimum requirements may be removed from consideration. Then, the hiring manager, search chair, and/or search consultant typically perform an initial screen of the full applicant pool and designate the most qualified candidates for the search committee to review in more depth. The hiring manager, in consultation with the search consultant and chair, can determine how best to narrow the candidate field.

Initial Interviews

The search committee generally narrows the applicant pool to approximately six to eight candidates and conducts initial virtual interviews. To ensure a fair and compliant search, each candidate should be treated similarly. The candidate experience should include consistent communication, interview questions, time, format, and interview panel.

Campus Visits

The search committee, in consultation with the hiring manager, generally invites two to four candidates for a campus visit. These visits, which may include meetings with the Chancellor, Chancellor's Cabinet members, other senior administrators, the hiring manager, the committee, and/or department colleagues, allow the candidate to see the team dynamic in person and interact with a broader group of constituencies. These meetings are often scheduled for a half-day or full-day and may include a meal with the candidate. Feedback from the various participants may be collected via an online survey and shared with the hiring manager to assist with final decision-making.

Reference Checks

Reference checks must be completed on one or more finalists, prior to any offer. The hiring manager is encouraged to personally call supervisory references. Other references may be called by any combination of the hiring manager, the search committee chair, and the search consultant. Information obtained from reference calls is summarized and reported to the hiring manager prior to a hiring decision.

Background Checks

The search consultant or HR enlists a third-party vendor to complete a pre-employment background check on one or more finalists. For certain senior-level positions, a more comprehensive executive background report may be requested at the discretion of the Chancellor and/or hiring authority.

Salary Discussions and Offer

Once the hiring manager has reviewed all the information and selected a preferred candidate, they discuss potential salary and offer terms with HR and the search consultant. Either the hiring manager or search consultant can extend a verbal offer to the candidate and discuss the terms (base salary, sign-on or relocation bonus, start date, etc.). Once terms are informally agreed to, the HR team follows up with a written appointment letter and terms of employment.

Announcement

Once the candidate accepts the offer, the hiring manager typically lets the committee know (and thanks them for their work) and collaborates with HR and Communications to issue an institution-wide and/or System-wide announcement or press release.

KEY DOCUMENTS

☒ Executive Search Process Flowchart

Support from Staff

Several campus departments are involved in the executive search process.

HR's Classification and Compensation department offers counsel and expertise to the hiring manager before the job is posted. Considerations include creating and/or updating a position description, determining the appropriate classification and salary range for the position, updating organizational charts, facilitating approvals from the finance department, etc. The position description serves as the basis for developing the job posting and position profile.

Once the position is approved and budgeted, a designated search consultant from UNC Executive Search Services team creates the job posting, develops a position profile, discusses an advertising and sourcing strategy with the hiring manager, proposes a general timeline, and offers guidance on the search committee representation as needed. During the course of the search, the consultant will help screen applicants, support the search committee, attend meetings, serve as a resource for the search, and advise on relevant System and institution policies and procedures.

Additional support includes:

- **Administrative staff:** Both HR administrative staff and the hiring department's administrative staff can be utilized to assist with scheduling meetings, expense approvals/paperwork, and other administrative duties as needed.
- **Communications:** The Communications team may be utilized to assist with the announcement of the new hire and any accompanying press release.

DEFINITIONS:

Position description is an internal document used to determine the most appropriate job title, salary range, job requirements, and performance expectations tied to a given job.

Job posting refers to the actual language used in the job ad and the HR applicant tracking system (ATS), by which candidates submit demographic information and upload documents for consideration (e.g., CV, cover letter, references).

Position profile is an advertising document, targeted toward potential applicants in the job market whose attention you are trying to gain. The profile markets the position, explains the context and the role of the UNC System Office, highlights your specific department, describes the local region, sets out the desired experience and qualities for the job, and directs the applicant to the appropriate job portal to apply. The position profile should let applicants know why they should want to work at your institution more than someplace else.

- **Legal Affairs:** The Legal Affairs department plays an important role in working with HR on employment policies and procedures and in interpreting state and federal employment laws and regulations. However, Legal is generally not involved in a search unless the hiring manager and/or HR needs to seek legal advice on a specific issue or candidate – or if there is a potential legal claim as a result of a search.
- **Finance:** The Finance department is typically involved in the initial budget approval, approval of any expenses related to the search, and in approving the final compensation package before it is offered to the selected candidate.

Sample Timeline

Week 1	Weeks 2-5	Week 3	Week 5	Week 6	Week 7	Week 9	Week 10	TBD
Form search committee & finalize job description/profile	Advertising/ recruiting	Kickoff meeting with committee	Initial candidate screening	Committee review & candidate selection meeting	First round interviews (Zoom)	Second round interviews (on-site)	Due diligence/offer	Start date (at the latest)

Search Committee Roles and Responsibilities

Using a search committee to help recruit, review, and assess senior level positions creates broader alignment and inherent buy-in for the selection process and ultimately the selected candidate, which is key to a successful leadership appointment.

Key Responsibilities and Tasks

The goal of the search committee is to achieve a working consensus about all major aspects of the search process. The committee serves as an advisory body for the hiring manager – tasked with recruiting a diverse pool of qualified candidates, conducting a legally defensible search, ensuring equitable treatment of applicants, and safeguarding confidentiality.

The primary responsibility of the committee is to evaluate and interview the candidates, provide constructive feedback to the hiring manager, and recommend a slate of top candidates for further consideration. Members of a search committee also serve as the face of the University to an external candidate; often, the committee members provide the first impression a candidate gets of an organization and therefore each member has a responsibility to represent the System/Institution as a positive and welcoming community.

Committee Membership

A typical search committee for an executive search should include a diverse representation of subject matter experts, senior leaders, and colleagues who will interact directly with this position. Hiring managers may also consider a colleague from the System Office or another peer institution in the UNC System to bring a different perspective to the committee. Hiring managers are advised to select 3-6 individuals for the committee, but may choose to involve additional stakeholders in campus visits for finalists. The hiring manager should also designate a trusted colleague as the search committee chair, preferably someone who holds a position at the same level or higher as the vacant position. The search chair serves as a key point of contact, runs the committee meetings, and is the spokesperson for the committee to the hiring manager.

The hiring manager also faces a decision point around whether or not to serve on the committee. Some managers prefer to let the committee do the initial candidate screens and only get involved when the pool has been narrowed to a few finalists. Other managers like to be part of the committee and involved in the entire process start to finish. The hiring manager may also wish to consider if or to what extent direct reports to the position are involved. The search consultant can help the hiring manager think through how best to handle these decisions.

Confidentiality

Confidentiality is imperative to a smooth and legally compliant search process. The search committee must be able to discuss candidates with complete candor, without fear that what is said will be repeated outside the confines of the committee.

This confidentiality not only protects the integrity of the search process, but also the reputation of the UNC System, its institutions, and the prospective candidates. Any breach in confidentiality without a candidate's consent could potentially jeopardize the candidate's current employment. The academic circle is small – especially within North Carolina and the UNC System – and even an innocent or vague remark could be enough for someone to identify a candidate.

Maintaining confidentiality is also a matter of law. North Carolina law protects the names and other personally identifiable information of applicants for state employment from public disclosure without consent and makes it a crime to allow an unauthorized person access to such confidential personnel information. Therefore, a committee member cannot disclose the name or other personally identifiable information without the applicant's permission. Committee members are expected to disclose any confidentiality breaches to the committee chair or search consultant for review and possible further action.

In addition, search committee members and any other stakeholders who have access to confidential candidate information often are asked to sign confidentiality agreements prior to their participation in the search. These documents will be drafted, reviewed, and kept on file by the institution's legal or HR team.

Confidentiality does not end when the search is complete – it lasts forever. Breaking confidentiality can damage the search and potentially harm the System Office and the candidates.

Search Records

Detailed records of search committee work should be maintained to document a legally compliant search and hiring process.

All records made or received in connection with the search (i.e., “the transaction of public business”) are considered public records under North Carolina law (G.S. 132-1). This means that the public has a right to inspect and copy the records, unless covered by an exception. This includes records in paper, electronic (including emails and text messages among committee members or trustees), and other forms.

However, state law also creates several categories of exceptions, including a specific protection for personnel file information, defined by G.S. 126-22 as, “any employment-related or personal information gathered by an employer.” This includes information related to an individual’s application and selection, such as applications, letters of reference, evaluative notes, or any other document that contains an applicant’s identity. It may also include phone logs, travel reimbursement forms, and other documents that would reveal an applicant’s identity.

Search committee records are maintained by the hiring department in a secured location for a period of no less than 3 years from the date of hire (this period is extended if there is a pending legal claim). Search committee members are provided with instructions on what materials to submit at the end of the search process. Until such instructions are provided, members should keep all records, notes, correspondence, etc., related to the search in a safe and secure manner.

Key Point: Records of the search process must be maintained and made available to the public if requested. However, any information specific to a candidate is not subject to disclosure under the Public Records Act.

Candidate Sourcing

The hiring manager and search committee work with the search consultant to develop a search and advertising strategy, based on UNC System guidelines for equal employment opportunity (see "Candidate Evaluation and Interviews" for additional details on equal employment requirements).

The search committee's goal should be to attract a diverse and talented pool from which candidates can be selected. The committee should be open to both traditional academic experience as well as non-traditional experience in the corporate, military, government, or non-profit sector.

All leadership positions are advertised on the organization's main LinkedIn page. The executive search team will also reach out directly to targeted passive candidates via LinkedIn's Recruiter tool.

Recommended advertising platforms to attract a deep and diverse candidate pool in higher education include:

- Chronicle of Higher Education
- Women in Higher Education
- Hispanic Outlook
- Diverse Issues in Higher Education
- Higher Ed Jobs
- Inside Higher Ed

In addition to standard advertising, other professional journals, newspapers, listservs, and/or associations can be used to target a particular demographic or particular area of subject matter expertise.

A strong sourcing strategy casts a wide net to reach diverse and underrepresented job groups and offers the search committee a broad and deep selection of candidates for consideration. Despite the tight job market, the best candidates may have several good job prospects. A "post and pray" recruiting strategy won't cut it. Search committee members need to think creatively – and work proactively – to recruit candidates. Many highly qualified candidates have to be invited to apply, especially if they do not see themselves as a natural fit for the University, your department, or this specific position. Simply placing ads in the relevant places will not produce the desired applicant pool. Personal outreach is the single most effective tool for building and diversifying the pool.

Key Point: Hiring managers and search committee members are also encouraged to play an active role in recruiting by reaching out to personal networks and encouraging interested individuals to apply.

Candidate Pool

Traditional vs. Non-Traditional Candidates

We encourage hiring managers and committee members to keep an open mind regarding candidates. The number of higher education leaders and administrators with non-academic backgrounds continues to grow. Executive jobs require a diverse set of skills to lead within an institution and the community, including business and management skills, innovation, and entrepreneurship.

In-State vs. Out-of-State Candidates

Executive positions at the UNC System are highly sought-after and attract a diverse pool of candidates nationally and even internationally. Out-of-state candidates are encouraged to apply and can bring a diverse perspective to the System. However, candidates from North Carolina – especially those within the UNC System – possess a unique knowledge of state laws and policies and a connection to local communities that can be very beneficial to the role. As such, hiring managers and search committees are encouraged to make a focused effort to attract and recruit homegrown talent from North Carolina for leadership positions.

Internal Candidates

In some cases, the University may have one or more internal candidates (i.e., current employees) well suited for the position. Strong internal candidates should be encouraged to apply for the position and go through the search process just like external candidates.

Searches with internal candidates must be handled carefully due to the potential for uncomfortable political or interpersonal dynamics and the higher risk of a breach of confidentiality. To avoid such complications, we advise the hiring manager, search committee, and any other staff involved in the search to rigidly adhere to a defined search process and treat all candidates equally.

As a general principle, internal candidates should undergo the same process (e.g., initial interviews, campus visits, reference/background checks, etc.) as external candidates and should be evaluated based on the same objective, job-related criteria. Current employees are often inherently desirable candidates due to institutional knowledge, established network/relationships, and an understanding of the campus culture and history. However, "courtesy interviews" – i.e., granting an internal candidate an interview solely because they work within the institution are generally discouraged if the candidate otherwise does not measure up to other qualified candidates in the pool.

Policy on Interpersonal Relationships

The UNC System's policy on interpersonal relationships (Section 300.4.1 of the UNC Policy Manual) states that "employees may not supervise, evaluate, or have authority for employment decisions over a person with whom they have or had a romantic relationship or who is a related person." The terms are defined within, but the intent is to prohibit any individual from effectively controlling the terms and conditions of a relative or romantic partner's employment. Any committee member or hiring manager who has or had either type of relationship with a candidate must notify HR.

Do you know one of the candidates outside of the search process?

Often search committee members may know one of the candidates for a position, personally and/or professionally. If you have a current or prior relationship with a candidate, please discuss with the search chair or search consultant, before discussing the candidate or your relationship with other search committee members.

Candidate Evaluations and Interviews

The candidate evaluation and interview process is key to the quality and integrity of the search. This is essentially the most important role of the search committee.

Equal Employment Opportunity (EEO) Requirements

Federal and state anti-discrimination laws prohibit discriminatory hiring practices against individuals based on a legally protected class (e.g., race, gender, religion, disability, etc.). This principle of equal employment opportunity is also a bedrock of the UNC System. Section 103 of *The Code* states: "Admission to, employment by, and promotion in the University of North Carolina and all of its constituent institutions shall be on the basis of merit, and there shall be no unlawful discrimination against any person on the basis of race, color, religion, sex, sexual orientation, gender identity, national origin, age, disability, genetic information, or veteran status."

All advertisements should also include the UNC System's EEO statement: "*The University of North Carolina System is an equal opportunity, affirmative action employer and welcomes all to apply, including protected veterans and individuals with disabilities*."

Search committees and hiring managers must uphold these standards to ensure the equitable treatment of all applicants and to ensure a legally defensible search. EEO-related complaints generally involve a disgruntled unsuccessful candidate who alleges that the interview was unfair because the process was inconsistent, information sought was not job-related, and/or a search committee member's behavior suggested bias or discrimination.

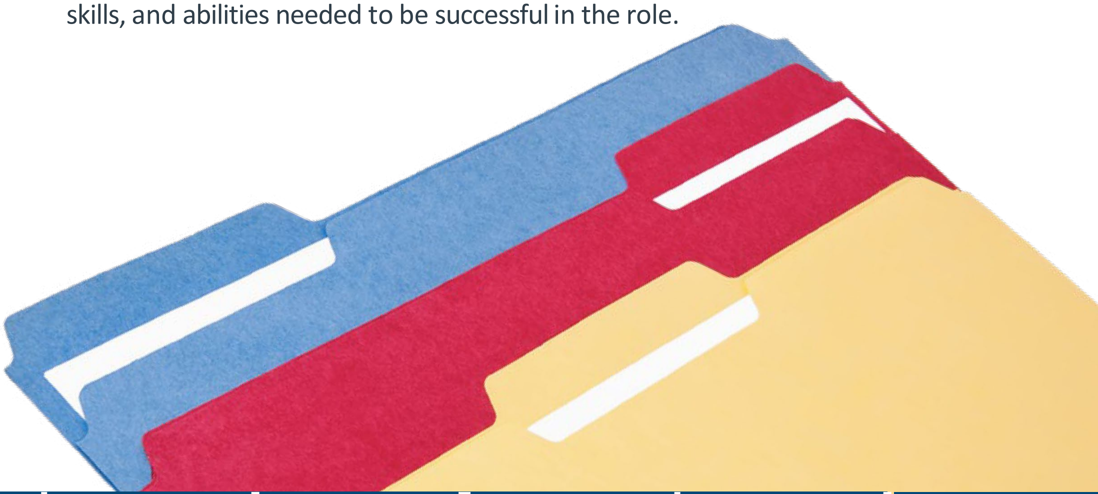
Guidance documents on equal opportunity interviewing and hiring processes are provided at the end of this section.

Candidate Screening

The candidate screening process includes several key steps to narrow the candidate pool:

- Search consultant conducts a pre-screen of all applicants to ensure that they at least meet the minimum qualifications of the job. Any candidates who do not meet the required education and/or experience thresholds – as set out in the job posting – are not advanced to the next level of screening.
- Typically, the search chair, hiring manager, or search consultant – or some combination of the three – conduct an initial screen of the full applicant pool. The goal is to narrow down the field to the most highly qualified candidates for the full search committee to consider.
- The search committee then narrows the list to approximately 6-8 candidates and conducts initial interviews, typically via videoconference.
- The committee then invites 2-3 finalists on site to meet with the committee, the hiring manager, and other System Office leaders.

With the help of the search consultant, the committee can decide on a candidate evaluation process or tool for each step of the screening process, including job-related criteria against which to evaluate candidates. These criteria should be based on the position profile and job requirements – specifically, the knowledge, skills, and abilities needed to be successful in the role.



Prohibition on Compelled Speech

Under UNC System Policy 300.5.1, employers are prohibited from asking an applicant about or requiring a statement upon "beliefs, affiliations, ideals, or principles regarding matters of contemporary political debate or social action" as a condition of employment. Nor shall applicants be "solicited or required to describe their actions in support of, or in opposition to, such beliefs, affiliations, ideals, or principles." This policy is intended to mitigate the risk of compelled speech that would undermine the UNC System's commitment to intellectual freedom and free expression.

Preliminary Salary Discussion

The search consultant will often have one or more conversations with a candidate prior to the initial interviews with the search committee. At that time, the consultant asks about each candidate's expected salary range to ensure that such expectations are within (or at least relatively close to) the allocated budget and position range. This preliminary inquiry garners valuable information for the hiring authority but also allows a candidate to withdraw without expending further time an energy on a position that may not be able to meet his or her salary expectations.

Initial Candidate Interviews

Once the candidates for initial interviews have been determined, the search consultant assists in coordinating logistics for the interviews. First-round interviews are typically conducted via phone or videoconference (e.g., Zoom). This allows the committee to get a good feel for each candidate without the expense of flying in numerous candidates for a face-to-face interview.

The interviews should be managed so that each candidate has a consistent experience; all candidates should be similarly treated. Reasonable accommodations should be made for candidates with a disability. The search consultant will take care of any technical arrangements (e.g., Zoom links and hosting) beforehand to ensure a smooth experience for the committee and the candidates.

Interview Guide

The search committee, with help from HR and the search consultant, develops an interview guide with nondiscriminatory, job-related questions that align with the experience, skills, and qualifications in the position profile. A prepared interview guide assures that the committee holds comparable interviews with each candidate.

All candidates are asked the same general questions — though it is understood that some candidate-specific questions may arise based on a candidate's specific experience, education, etc. The search committee also should feel free to ask legally permissible follow-up (i.e., not-on-script) questions during the interview, if and when a candidate's response requires further explanation or suggests issues not anticipated by the search committee.

General guidelines for developing pre-determined interview questions or asking follow-up questions include:

- Ensure interview questions reflect the job requirements.
- Utilize a combination of behavior-based (e.g., "Tell me about a time when...") and situational (e.g., "What would you do if...") interview questions that require demonstration of specific competencies.
- Avoid asking questions that directly or indirectly inquire about an individual's protected class status or that are not job-related (see "EEO Guidelines for Interviewing").
- If candidates offer protected information unsolicited, redirect the conversation and do not consider the protected information in your evaluation or decision-making.

Interview Process

Experience indicates that search committee interviews work more efficiently and effectively when questions are assigned to specific committee members. In most instances, as the interviews progress, the committee member gets better at asking the question and the rest of the committee get better at hearing the response. It is not necessary for every committee member to ask questions during the interview.

The interview should be conducted in a natural and relaxed manner to put the candidate at ease and gain as much information as possible. Also, if a question was already answered in a previous response, the search committee chair can prompt a move to the next question.

At the beginning of each interview session, the search committee chair welcomes the candidate and introduces the committee members. Alternatively, the chair can ask each member of the search committee to introduce themselves briefly and indicate their affiliation with the institution.

After introductions, the chair describes the process to be used in the interview and reminds the candidate of the time parameters. A general framework for the interview session is as follows:

- Welcome, general description of the position from the chair, committee introductions (5 minutes)
- A series of questions from the committee members (40 minutes)
- Time for candidate to ask questions, seek further clarification on any aspect of the position, and/or elaborate on issues not adequately addressed earlier (5 minutes)

The chair closes the interview by thanking the candidate for his or her participation and giving information about the next steps in the process.

Remember, the impression you make matters – the candidate is interviewing you as much as you are interviewing the candidate.

Campus Visit

Based on the search committee's evaluation and discussion following the initial interviews – and in consultation with the hiring manager – the search consultant reaches out to the top two to four candidates to extend an invitation to come to campus for in-person interviews.

Semi-Final Round?

Given the particular circumstances of a search, the committee and/or hiring manager may prefer to include an additional round of more in-depth video screening interviews prior to inviting any candidates on-site for a visit. This typically makes sense if the committee needs more information or is still interested in more than three or four candidates. In this case, only one or two most qualified candidates may be invited on-site for a final round.

A typical campus visit is designed to allow the top candidates to get a feel for the institution and allows the hiring manager, committee members, and other select staff and leadership to meet each candidate face to face and have more in-depth discussions. Generally, a candidate spends a morning or afternoon meeting directly with the committee, meeting other colleagues and leaders (depending on the nature of the role and the discretion of the hiring manager), having a short one-on-one with the search consultant, and having a private meeting and/or meal with the hiring manager.

The campus visit can also be used to evaluate the candidates' presentation skills and/or work product. The search consultant can help the hiring manager and committee come up with a suitable – and brief – presentation prompt, demonstration assignment, or discussion prompt to give to finalists well in advance of the visit. This provides an opportunity to observe a different skillset and to see how the candidates perform when given time to analyze, research, and prepare substantive materials. The presentation /demonstration must be clearly job-related and to the extent possible, simulate role-related tasks.

To ensure consistent treatment of applicants, on-site visits should be managed so that each candidate has the same general experience. The search consultant reminds any staff members who meet the candidates and are not otherwise members of the search committee to protect the confidentiality of the applicants' names and materials. Candidates are also notified in advance of the individuals with whom they will be meeting.

Following the campus visits, the search consultant solicits feedback from the committee and any other participants (see sample survey questions) to help the hiring manager with his or her ultimate decision.

Due Diligence

At the appropriate time – typically concurrent with or shortly after the campus visits – one or more candidate's references are contacted. Prior to making any written offer, the search consultant or campus HR team also initiates a background check on the preferred candidate.

References

Reference checks are conducted by HR, the search consultant, and/or the hiring manager. Some hiring managers prefer to talk to all references; most hiring managers at least talk directly with a candidate's immediate supervisor. As a professional courtesy, the search consultant contacts the candidate(s) in advance of calling any references, to be sure that the candidate has the opportunity to speak with each reference personally. Each reference is asked the same questions about a candidate and the caller records his or her notes and shares with HR.

It is imperative that committee members not contact a finalist's reference outside of the formal reference process, even if the committee member knows the listed reference personally. Further, committee members and trustees should not ask people outside the search process for their opinions about an applicant, including personal or professional contacts at an institution or company where an applicant has studied or been employed.

Soliciting opinions outside the formal reference process is inadvisable for several reasons. For one thing, the individual may only have limited or isolated knowledge of the candidate — with no responsibility for supervising or evaluating the candidate or knowledge of how the individual performs in the workplace. It could also raise concerns if certain candidates are treated differently from others, with respect to how references are contacted. And speaking to an individual about an applicant without the candidate's consent could violate state confidentiality laws on personnel records and potentially jeopardize the candidate's reputation and current employment.

On a related note, if a committee member receives unsolicited information about a candidate from personal or professional acquaintances, that information should be brought to the attention of the search committee chair or hiring manager to decide how handle in consultation with HR and potentially legal counsel.

Background Checks

The search consultant or HR will engage a third-party vendor to conduct criminal history and educational verification checks on one or more finalists. The background check must be completed and passed before any written offer may be extended (unless the offer is contingent on a successful background check). If anything is flagged on the report, HR follows up with the candidate and makes a final determination on whether or not the offer can still be extended. This process typically takes three to five days.

Note, for certain executive positions, the hiring manager may choose to engage a separate vendor to conduct a deeper executive background investigation into a candidate's educational credentials, media coverage, social media history, plagiarism check, and/or civil litigation.

RESOURCES AND KEY DOCUMENTS

- EEO Guidelines for Interviewing
- Sample Reference Check Form

Offer Process

Once the hiring manager decides he or she wants to make an offer to a candidate, the search consultant works with the manager to discuss the terms of the offer, including salary, sign-on bonus or relocation expense reimbursement, and proposed start date. HR conducts an internal salary compensation analysis to ensure that the proposed salary does not create any equity or compression issues with other comparable positions within the institution. Many campuses also require the hiring manager or HR to draft a hiring proposal, which includes the rationale for selecting the particular candidate as well as a justification of the salary to be offered. Once the hiring proposal is approved, the search consultant or hiring manager reaches out to the candidate to make a verbal offer and answer any final candidate questions. Once terms are tentatively agreed to, a formal written offer is extended.

Sign-on Bonuses and Relocation Expenses

Each campus may award sign-on bonuses and/or provide a relocation stipend or reimbursement for EHRA employees, so long as they comply with UNC System and institutional policies and regulations.

The final step in the offer process is for HR to send the prospective employee a formal appointment letter as well as a document the spells out the specific terms and conditions of employment. When the candidate returns the signed and executed documentation to HR, the hiring manager typically reaches out to the new hire by phone to offer congratulations and talk about any next steps prior to the start date.

Search close out

The search committee chair notifies the committee of the new hire and instructs committee members to retain all notes related to the search for three years. In addition, the search consultant works with the hiring manager to ensure all candidates are contacted to update them on the outcome of the search. Each candidate should receive either a call or email apprising them of the status of their candidacy.

Conclusion

Hiring a new leader is one of the most important and difficult tasks in which a search committee and hiring manager will be involved. It requires a high level of cooperation and trust among all involved – and ultimately, a trust in the process.

Hopefully, this guide serves as a road map as you embark on this challenging yet critical journey to find the best leaders for the UNC System.

If you need further assistance or have questions regarding the search process, please contact:

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