System Office HR Process – Filling a Permanent Position

Standard Operating Procedure

Table of Contents

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Standard Operating Procedure

Purpose

The purpose of this document is to outline the hiring process for vacant permanent positions organizationally aligned within the system office. This process is for positions that are already established with existing budgetary funding, as there is a separate process to follow if new funding is needed for the position.

If a manager has a recent vacancy or an older vacancy they are proposing to be filled, this is the process that hiring managers will follow to ultimately hire a candidate to fill the position.

Scope

This document covers the following processes:

- Preparing the Vacant Position
- Post and Recruit for the Position
- Interviews and Selection Process
- Extending an Offer to a Candidate

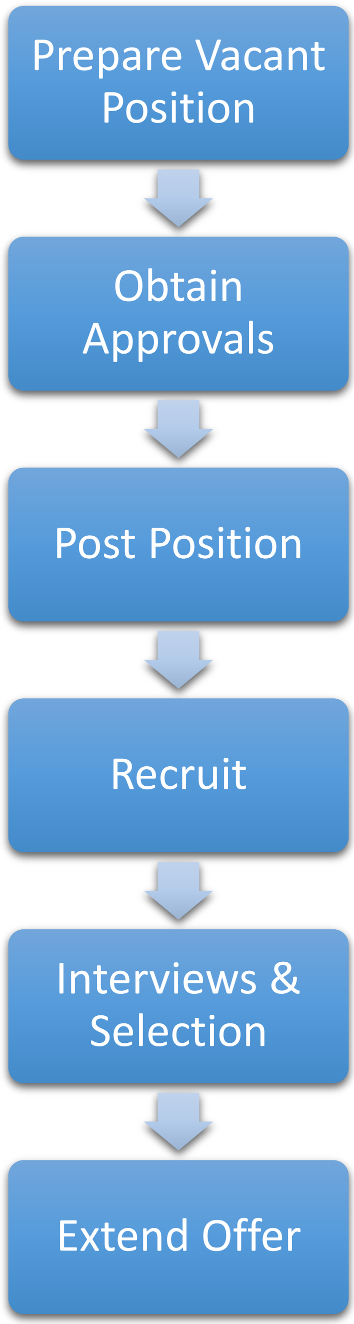
Roles & Responsibilities

Employees and teams with roles in this process are:

Job title	Responsibility
Division Hiring Manager	Initiates the process with HR to fill their vacant position(s), reviews job description(s) on file for position and updates it as needed or confirms accuracy, identifies the search committee, coordinates with the search committee's schedules for interviews, interviews candidates, makes final candidate decision, conducts reference checks, provides justification for the selected candidate.
Talent and Acquisition Consultant	Consults with the hiring manager and crafts job posting, advises on the interview process, advertises the job on relevant career sites, monitors the applicant pools for sufficient qualified applicants and diversity, screens applicants for qualifications, conducts telephone pre-screens for potential candidates (when needed), schedules interviews with candidates, primary contact for communication with candidates through the recruitment process, conducts background checks, extends verbal and written offer to final candidate.
System Office HR Director	Consults with the hiring manager on intent to fill position and any position changes, initiates and explains the process, initiates the PEA form to route for approvals, approves classification, reviews hiring packet for salary, equity and EEO compliance
System Office Director of Budget	Reviews Permanent Employee Change Authorization (PEA) form to ensure the budget is available & consults with Business POC and/or hiring manager on position funding/ chart fields, approves the PEA form for subsequent approvals, approves ePAR for updates as needed in ConnectCarolina

Class and Comp Consultant	Consults with hiring manager on appropriate classification of position based on updated job description, updates ConnectCarolina with the position description and classification information, obtains the necessary approvals from OSHR and/or BOG (as needed), creates the requisition request in Cornerstone.
Business Point of Contact (POC)	Assists the hiring manager in identifying budget and appropriate chart fields for the PEA form, completes the PEA form with budget and chart field information.
Senior Vice President	Reviews and signs the PEA form to authorize filling the vacant position as presented.
VP & Chief Human Resource Officer	Reviews and signs the PEA form to authorize filling the vacant position as presented.
SVP & Chief Financial Officer	Reviews and signs the PEA form to authorize filling the vacant position as presented.

Workflow


Prepare Vacant Position
Obtain Approvals
Post Position
Recruit
Interviews & Selection
Extend Offer

Procedural Steps

I. Preparing the Vacant Position

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>The need to fill a vacant position is identified:
<table>
<tr><th>IF</th><th>THEN</th></tr>
<tr><td>Recent vacancy due to separation</td><td>HR will email the hiring manager with position description for review and update.</td></tr>
<tr><td>Older vacancy or newly identified position</td><td>Hiring manager will reach out to System Office HR Director for consultation and prepare a new position description.</td></tr>
</table></td></tr>
<tr><td>2.</td><td>Hiring manager consults with System Office HR Director and Classification and Compensation Consultant on intent for vacant position, changes to the position, required education and experience, and any recent organizational structure changes that may impact the role. HR works with the hiring manager to review the job description, salary range and agree on a hiring range for the role.</td></tr>
<tr><td>3.</td><td>Hiring manager works with business point of contact and budget analyst to ensure funding source is identified for the position.
<table>
<tr><th>IF</th><th>THEN</th></tr>
<tr><td>Position requires new funding not already budgeted for</td><td>Hiring manager must first work with the RAC committee process for approval prior to moving forward. Once that is complete the hiring manager can continue this process with HR and continue to step 4</td></tr>
<tr><td>Position will be utilizing existing funds/budget</td><td>Proceed to step 4</td></tr>
</table></td></tr>
<tr><td>4.</td><td>HR initiates the PEA form based on discussions for the role and appropriate salary range for the position and attaches the updated position description.

While the PEA form is routing HR also completes the following actions:
a. Initiates an ePAR to update the position description in ConnectCarolina and route for approvals.
b. Submits position updates to the Comp Database when applicable to route for appropriate approvals such as OSHR, System Office, and/or BOG.
c. When all ePAR approvals are complete the position is successfully updated in ConnectCarolina. If the position is new, then HR provides the Cornerstone admin information required to manually pull the new position into Cornerstone to populate position information from ConnectCarolina. If the position is only being modified, then Cornerstone will automatically pickup the new information in a data feed.</td></tr>
<tr><td></td><td>Continue to next page. →</td></tr>
</table>

Step	Action
	d. Once the data is fed to Cornerstone, HR can then create the requisition request in Cornerstone.
5.	The Business Point of Contact completes the funding and chart field information on the PEA form and submits to the following for review, edits and signature authorizing the position to be filled as requested. a. Division Senior Vice President b. Budget Officer c. Vice President and Chief Human Resources Officer d. Senior Vice President of Finance & Budget or Designee **Note: The HR and funding ePAR approvers in step 4 of this procedure, System Office HR Director, and Classification and Compensation Consultant are all copied on the PEA form while routing so they can proceed with approvals in ConnectCarolina while the PEA form and other approvals are being obtained.*
6.	Once the PEA Form has routed for all approvals the following individuals will receive a copy of the final approved PEA Form: • Division Senior Vice President • Budget Officer • Vice President and Chief HR Officer • Senior Vice President of Finance & Budget or Designee • System Office HR Director • Classification and Compensation Consultant • Payroll Specialist • Talent Acquisition Consultant

II. Post and Recruit for Position

Step	Action
7.	The Talent Acquisition Consultant self-assigns the requisition request in Cornerstone to create a requisition and draft a job posting. In addition, they schedule a consultation with the hiring manager to develop a search, outreach, and advertising strategy, establish a search committee, and go over the recruitment and selection process.
8.	The Talent Acquisition Consultant drafts the job posting and sends to the hiring manager for review and approval.
9.	The Talent Acquisition Consultant then waits for notification from System Office HR Director or Classification and Compensation Consultant that all applicable approvals have been obtained and the position has been cleared to post, as well as the hiring manager's approval of the drafted job posting.
	Continue to next page. →

Step	Action
10.	The Talent Acquisition Consultant posts the position on all applicable job boards and begins any sourcing activities as discussed with hiring manager.
11.	The hiring manager and/search committee should block time, based on timeline provided by the Talent Acquisition Consultant during their consult, for interviews and develop interview questions, so they are ready to interview as soon as they have a pool of strong qualified candidates.
12.	While the position is posted, the Talent Acquisition Consultant starts screening and referring qualified applicants for the hiring manager and/or search committee to review, and monitors the applicant pool for diversity and sufficient qualified applicants for potential posting extension (for SHRA positions) or additional advertising/recruitment methods needed.
13.	Once the hiring manager identifies a pool of strong qualified candidates (ideally 5-10) they will forward the names to the Talent Acquisition Consultant for telephone pre-screens, if desired.
14.	The Talent Acquisition Consultant will conduct telephone pre-screens of the top candidates to initiate relationship, discuss position and identify continued interest, ensure appropriate understanding of position location requirements and remote work eligibility, and identify salary requirements prior to moving forward.
15.	The Talent Acquisition Consultant will notify the hiring manager and/or search committee if there are any issues preventing their top candidates from moving forward (such as visa issues, salary concerns, or if they have withdrawn) with scheduling interviews.

III. Interviews and Selection

Step	Action
	The hiring manager and/or search committee will select ideally 6-8 candidates to schedule first-round interviews either via videoconferencing or in person. A minimum of 3 candidates is an HR best practice.
	The Talent Acquisition Consultant will contact candidates to schedule interviews during allotted timeframes provided by the hiring manager, search committee chair, or designee.
18.	The interview process continues until a pool of semi-final candidates are selected. The search committee identifies no more than 4 candidates to schedule for final interviews.
19.	The hiring manager and/or search committee chair or designee will provide the list of final candidates and their scheduled time blocks to the Talent Acquisition Consultant to schedule in person interviews with the candidates.
20.	The Talent Acquisition Consultant will contact final candidates for interview and send them an invite to complete their background checks via CastleBranch.
	Continue to next page. →

Step	Action
21.	Hiring manager identifies the top candidate and notifies the Talent Acquisition Consultant who contacts the candidate for at least 3 references (2 professional and 1 personal) including at least one former or current supervisor. The Talent Acquisition Consultant will provide the hiring manager with a template reference check form and the contact information for the candidate's references to discuss the candidate's prior performance, reason for leaving prior employment, and eligibility for rehire.
22.	Hiring manager consults with Talent Acquisition Consultant regarding salary and offer terms and provides their justification for hire and salary.

IV. Extending an Offer

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>23.</td><td>Talent Acquisition Consultant will review the background check and confirm it has cleared, review salary for equity and EEO compliance and complete salary analysis for System Office HR Director approval, and review any prior performance reviews (for internal/UNC constituent institution and state government candidates)
- If there are equity concerns with the recommended salary offer, HR will discuss with the hiring manager to see if any adjustments should be made to align with equity and EEO standards</td></tr>
<tr><td>24.</td><td>Once HR approves the hiring packet, the Talent Acquisition Consultant will contact the selected candidate and negotiate salary and start date with the candidate on behalf of the hiring manager.
<table>
<tr><th>IF</th><th>THEN</th></tr>
<tr><td>Candidate presents a counteroffer</td><td>
<table>
<tr><th>IF</th><th>THEN</th></tr>
<tr><td>Counteroffer is within predetermined allowance for negotiation</td><td>Talent Acquisition Consultant will negotiate within allowance to close.</td></tr>
<tr><td>Counteroffer is outside allowance</td><td>Talent Acquisition Consultant will work with the hiring manager on how they want to proceed either to find additional funding, proceed with the second-choice candidate, or repost.</td></tr>
</table>
</td></tr>
<tr><td>Candidate declines</td><td>Talent Acquisition Consultant will work with the hiring manager if they want to proceed with a second-choice candidate or repost.</td></tr>
<tr><td>Candidate accepts</td><td>Continue to step 25 on next page. →</td></tr>
</table>
</td></tr>
</table>

Step	Action
25.	Once the verbal offer is accepted the Talent Acquisition Consultant will send the written offer for candidate's signature.
26.	Candidate signs the offer.
27.	**Standard Operating Procedure complete.** ✓

Reference

The following documents are not attached here, but may be of additional assistance:

- ***Sample PEA Forms***
- ***Permanent Employee Process Overview***
- ***Division Finance Points of Contact***
- ***EEO Guidelines for Interviewing***
- ***Behavioral-Based Interviewing Guidelines***
- ***Reference Check Template Form***

Revision History

Version	Date	Author	Description
v0-1	2/16/23	Matt Gibson	Draft created
v0-2	2/25/23	Christina Hawkins	Draft updated
v1-0	3/9/23		Approved by Darryl Bass, Vice President and Chief Human Resources Officer