New Faculty -- The big picture:

<table>
<thead>
<tr>
<th>Step</th>
<th>This step is done when ...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Position request</td>
<td>...you have received a notification in BearQuest that your requested position is approved for search.</td>
</tr>
<tr>
<td>Search/Interview/Selection</td>
<td>...you have finished interviewing your candidates and have selected the candidate you would like to put forward.</td>
</tr>
<tr>
<td>Hiring</td>
<td>...you have received word through BearQuest that HR has received the signed contract from your candidate.</td>
</tr>
<tr>
<td>Orientation/ “on-boarding”</td>
<td>...your new faculty member is on the job and up to speed.</td>
</tr>
</tbody>
</table>

Complete File -- The provost’s office must have a complete file in order to move the contract process forward. A complete file includes:

- Faculty prospect interview form
- Curriculum vitae
- Official transcript indicating highest degree conferred and hours completed toward PhD if in progress
- Statement regarding Christian experience and/or active church membership (can be on faculty prospect interview form or in a separate document)
- Three letters of reference
- Faculty certification of credentials form
- Consent and disclosure form
- Signatures of tenured faculty for tenured/tenure-track hires (from EMS)

Other important information to collect:

- Basic technology questions for prospective faculty (See example, page 33.)
Table of Contents:

General steps in the Hiring Process – page 3
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Steps for Faculty Hiring in BearQuest – page 5
Screen by screen instructions:
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• Completing the EMS information – page 9
• Printing the tenured faculty signature page – page 16
• Completing the addendum worksheet – page 19
• Completing the budget form and releasing for review – page 20
Appendices
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• Example of HR memo with Baylor ID number – page 27
• Examples of Faculty Hire Memos – page 28
• Examples of Basic Technology Questions for Prospective Faculty – page 31
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Faculty Hiring in BearQuest

General Steps in the Hiring process:

• HR will send an email to you (the chair) when the candidate’s background check has cleared. FYI: This email will also include a Baylor ID number for the candidate. (For an example, see page 27)

• Once you (the chair or chair’s assistant) have received the email from HR you will need to complete a Faculty Hire request in BearQuest. The information you enter in this request will be the information HR uses to generate the contract. To complete the hire request you will probably need copies of the EMS summary and budget form from the original approved position request.

• If you are hiring for a tenured or tenure-track position, print the faculty signature form (from EMS). Collect the required tenured faculty signatures, and send the completed form to the Dean’s office to be included in the candidate’s file. The Dean’s office will not release the request to the provost until they have received this completed form.

• If the contract will include special terms and conditions, it is a good idea to write a Faculty Hire Memo describing the details of the offer you would like to propose. (See examples on pages 28-30 of this workbook.) Attach the memo to the request in BearQuest. Please make every effort to make these memos clear and concise.

• Communicate as necessary with the dean’s office and provost’s office to finalize details of the contract to be proposed and to resolve any funding issues. When the Provost is satisfied he/she will release the request to HR.

• When HR sends the contract through email for final approval, review all details carefully and then "reply to all" with your approval or changes.

• You will receive an e-mail through Bearquest when the contract has been sent. FYI: Once the contract has been mailed, you can find details about how the contract was sent and tracking information in the comments attached to the request in BearQuest.

• You will receive notice through BearQuest when the candidate has either signed or rejected the contract.
Faculty Hiring in BearQuest

Other notes and tips about faculty hiring:

- Once you have received confirmation that the provost has officially approved the hire of your candidate, it is permissible for you to contact the candidate and let him or her know a contract is being generated. **You may not make an offer to the candidate -- only the president or provost are authorized to do so, and it comes in the form of a contract.**

- For tenure-track positions, if the faculty member has not completed the terminal degree prior to his/her arriving on campus, he/she will be appointed as a lecturer at a reduced salary and with a full teaching load. That status can be upgraded the following semester if the degree has been conferred. **Note:** The Provost’s office must have a transcript noting the highest degree conferred before the revised contract will be sent.

- Please make every effort to be sure Faculty Hire Memos are clear and concise. This will greatly help the reviewers process your request more quickly. For examples see pages 28-30 of this workbook.

- If the amount of money proposed for the contract (total of salary, start-up funds, travel, technology, etc.) is higher than the amount requested and approved in the original position request, the difference will need to be justified and resolved to the provost’s satisfaction and additional funding sources identified before the contract will be sent.

- Appropriate technology arrangements are crucial for the success and happiness of new faculty members. Please keep your Academic Technology Director informed and involved throughout the hiring process. See an example of the Basic Technology Questions for Prospective Faculty for the College of Arts and Sciences on page 31 of this workbook. The earlier in the hiring process these kinds of questions can be answered, the better.

- If you think your candidate may be a non-U.S. citizen, please contact Felicia Rodriguez in the Office of General Counsel (3821) before submitting your Faculty Hire Request in BearQuest. There are special considerations (e.g. specific salary requirements, visa requirements) associated with hiring non-U.S. citizens that may affect the provisions of the contract.
Faculty Hiring in BearQuest

Go to URL: [www.baylor.edu/bearquest](http://www.baylor.edu/bearquest)

Start a request:
- Choose “Faculty Hire Request” as the request type
- Enter a name that includes the word “Hire”

Attach Faculty Hire Memo (if needed). – You can do this at any point before releasing the request for review.

Complete overview – Check “yes” for “special terms and conditions” if appropriate.

Complete EMS:
- Select the appropriate approved project against which to hire
- Complete the information that will be used to create the contract
- Print the faculty signature form (if needed).

Complete addendum form (if needed). Remember: You need to manually calculate the totals and enter them on the last line of the form.

Complete budget form – compare to original position request. Make sure total allocation requested is zero or negative.

Release for review.
Select “Faculty Hire Request” as your request type.

**Note:** It is important to decide who you want to be the “original requestor” for any BearQuest request. For example, if you are the chair entering the request, but you want your administrative assistant to be able to work on it at some point, you will probably want to use the “someone else” feature and enter the request under that person’s name. Otherwise, your assistant will not be able to open the request to work on it.

This is especially important when you are entering a faculty position request. Only the person who makes the initial position request or the person assigned to the request (using the “someone else” feature) will be able to enter a faculty hire request against the approved position.
Give your request a name:

- Include the word “Hire” in the name; this let’s the reviewer’s know that this is an urgent request.
- Use the BearQuest naming convention (See page 26)

Then click “Start Request.”
Fill out the information on this overview form as requested.

Be sure to indicate “Yes” if the contract will require a special terms and conditions addendum. This means you should indicate “Yes” if you believe the contract will include any special contractual agreements such as start-up funds, a special Title, exceptions to the standard moving policy, etc.

At this point, you may want to go ahead and attach your “Faculty Hire Memo.” You can attach it at any point before releasing the request for review. For instructions on how to attach a document, see pages 32-34 of this workbook.

When you have completed the form, click “Submit.”
Faculty Hiring in BearQuest

Click “Go to EMS.” (DO NOT click “Submit” at this point.)

Note: By clicking “Go to EMS” you will be opening a window for a separate program, the Employment Management System (EMS). For the next several steps you will be in the EMS. You will return to BearQuest when you have completed the necessary information in the EMS, then you will click “Submit.”.

This is the entrance screen for the EMS. Select the name of your department from the “department making request” list and enter your Department ID (TRAX ID number) in the appropriate field. Then click “Continue.”

Note: Since you selected “Faculty Hire Request” as your request type in BearQuest, the Position Type and Action Requested are automatically set to “Faculty” and “Hire a faculty member” on this screen.
On this screen you will see a list of the approved requests you have in BearQuest. Click on the number of the approved faculty request against which you will be hiring.

Click in the box to confirm this is the action you are requesting.

Then click “next.”
Before you started this request, you should have received an email from HR indicating that the candidate had cleared his/her background check. That email also includes the candidate’s Baylor ID number (e.g. 891 123 456). Enter that number and EMS will automatically populate the “name” field.

If for some reason you cannot find the Baylor ID number, enter the legal name of the candidate as it should appear on the contract.

Then click “next.”

**Note:** If you think the candidate has a visa, be sure to enter his/her name exactly as it would appear on his/her visa.
The budget department should have already filled in a position number which will appear in the field on this page.

You should not need to enter anything; click “next.”

**Note:** If for some reason the position number does not appear on this page, please call the Budget Department for assistance: 254-710-2663.
Enter the appropriate title.

Select the appropriate rank from the drop down menu.

Enter the appropriate “assignment Percentage.” (e.g. for a full-time position enter “100;” for a ¾ time position, enter 75.)

Enter the effective start date. For brand new faculty this will be the first day of new faculty orientation, usually the Wednesday before returning faculty start. (e.g. If classes begin 8/24, returning faculty start the Monday before that, 8/17. The effective start date for a brand new faculty person would be 8/12, the Wednesday before the rest of the faculty come back.)

Answer the other questions as appropriate. Then click “next.”

Enter the salary you want to appear in the contract.

Select the appropriate contract term. -- For most teaching faculty you will enter the 10 month salary. The 12 month option is intended for library, museum and law school.

Then click “next.”
Faculty Hiring in BearQuest

Usually you will just click “next” on this page.

If this position happens to be being hired into a brand new department, click “yes” and answer the questions that will be presented to you.

- Select the account from which the new faculty member will be paid. For teaching faculty, it will usually be 9113 (Contract Faculty – teaching) or 9143 (Regular Full-Time Lecturer).

- Be sure the percentage amount is correct – in most cases it will be 100.

- Click “Save” then click “next.”
In most cases you can just click “next” to move on to the next page.

If you do happen to be splitting the new faculty member’s pay between two or more accounts, click “yes” and enter the information requested.

This is the last page within EMS.

Note that it reminds you to print the tenured faculty signature sheet. You will do that on the next page.

Click “Finish.”
Once you have completed the information required in EMS, you will be returned to this opening page. Notice that your hire request is now listed in the box in the middle of the page. If you want to make changes at this point, you can click “Select to edit/review.”

This is also the page from which you will print the signature page for tenured faculty signatures.

Click “Printable tenured signatures.”
This is what the signature sheet will look like. You will need to have one of these completed for any tenured or tenure track position. Forward the completed, signed form to the dean’s office.

Once you have printed it, click “Go back” to return to the EMS screen.

Click “close browser” to return to BearQuest.
Once you have closed the EMS window, you should be returned to this BearQuest form.

Click “submit” to continue with your request.
If you said “yes” to special terms and conditions on the overview form, you will be presented with this addendum worksheet. The purpose of this form is for you to specify how the money you requested as “start up funds” in the original position request will be spent. This is the information HR will use to create the Special Terms and Conditions Addendum.

**PLEASE NOTE: This is a static worksheet. It does not do calculations for you.**

Enter the appropriate information, then calculate the totals for years 1, 2, and 3 manually and enter those numbers in the “totals” boxes at the bottom of the screen. Only the numbers in these “total” boxes will be carried forward to the budget form.

When you are finished, click “submit.”

In addition to completing this worksheet, it is a good idea to write a Faculty Hire Memo describing the details of the offer you would like to propose. (See examples on pages 28-30 of this workbook.) Please make every effort to be clear and concise. Attach the memo to the request before releasing it for review. See page 32 for help attaching.
This is the budget form, the last BearQuest form in the Faculty Hire Request. The most important numbers on this form are in the last row -- total allocation requested. By the time this request is released to the provost, all of these numbers should be **zero or negative**. The next several pages will show you how it works.

To complete this form you will probably need copies of the EMS summary and budget forms from the original approved position request against which you are hiring.
The information in this top section of the budget form is filled by the system using information you entered on other forms. You cannot change this information on this form. Two numbers you need to check are:

- **Salary from EMS** - You entered this amount in EMS, and you would need to go back to EMS to change it. The system automatically compares the salary amount from this request with the amount approved in the original position request and shows you the difference.

- **Addendum costs** - The system also brings forward the total amount you entered in the addendum worksheet for start-up funds.
The second section of the budget form is for you to enter the actual amounts you will need for regular capital or operating costs. You estimated these amounts in the original position request. If those estimates are still correct, you can simply copy them from the original position request into this new form.

If you find that you need more money, you will need to find a way to cover the additional costs before a contract can be issued. You will enter the funding sources in the next section of the budget form.

<table>
<thead>
<tr>
<th>Amount Requested Yearly?</th>
<th>Year 1</th>
<th>Year 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personnel</td>
<td>2000.00</td>
<td>2000.00</td>
</tr>
<tr>
<td>Fringe (from EMS)</td>
<td>300.00</td>
<td>300.00</td>
</tr>
<tr>
<td>Personnel Funds (from EMS)</td>
<td>60</td>
<td>60</td>
</tr>
</tbody>
</table>

### Other Capital and Operating Costs

<table>
<thead>
<tr>
<th>Capital</th>
<th>Year 1</th>
<th>Year 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Office Furnishings</td>
<td>2000.00</td>
<td>2000.00</td>
</tr>
<tr>
<td>Computer</td>
<td>2000.00</td>
<td>2000.00</td>
</tr>
<tr>
<td>Other Technology</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other Equipment</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Operating Expense</th>
<th>Year 1</th>
<th>Year 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Telephone</td>
<td>300.00</td>
<td>300.00</td>
</tr>
<tr>
<td>Travel</td>
<td>3000.00</td>
<td>3000.00</td>
</tr>
<tr>
<td>Supplies</td>
<td>200.00</td>
<td>200.00</td>
</tr>
<tr>
<td>Contract Services</td>
<td>1000.00</td>
<td>1000.00</td>
</tr>
<tr>
<td>Misc. Other</td>
<td>1000.00</td>
<td>1000.00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Library Materials</th>
<th>Year 1</th>
<th>Year 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>1000.00</td>
<td>1000.00</td>
<td></td>
</tr>
</tbody>
</table>

### Funding Sources

- GIFs
- Grants
- Endowment Income
- From Current Operating Budget
- Specific Department(s) supplying above funds
- Other Sources
- Grant & Other Funding (from EMS)

### Total Funding - Non Personnel

<table>
<thead>
<tr>
<th>Year 1</th>
<th>Year 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>10,000.00</td>
<td>10,000.00</td>
</tr>
</tbody>
</table>

### Total Funding (incl. Personnel)

<table>
<thead>
<tr>
<th>Year 1</th>
<th>Year 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>10,000.00</td>
<td>10,000.00</td>
</tr>
</tbody>
</table>

**NOTE:** If you have made EMS revisions, please click the Submit button at the bottom of this form.
In this section for funding sources you need to list the funds that are going to be used to pay for all the costs you have listed above, except for personnel costs. Those have already been subtracted.

If you estimated funds in the original position request and those estimates are still good, you can copy them into the appropriate fields on this form. Otherwise, make adjustments as needed.

The “other sources” field is where you will enter the funding that was approved in the original position request. Enter the total amount for “total non-personnel costs” plus any amount that was approved for “faculty start up costs.” (For example, $20,000 faculty start up costs + $10,300 total non-personnel costs = $30,300 approved funding that you can list in “other sources.”). You may want to include a brief note of explanation in the text field labeled “Specify department supplying above funds.”

Once you have entered your funding sources, the “total allocation requested” numbers should come out to zero or a negative number.

When you are finished, click “release for review.” This will send the request to the first reviewer.
This page shows that you have completed the Faculty Hire Request.

**Note:** If you have not attached your Faculty Hire Memo by this point, do it now; don’t wait. The dean’s office cannot begin work on your request until they have all pertinent information. To attach the memo at this point, click the box that says “View Request Summary/Add Comments.”
Appendices:

- Naming convention
- Sample e-mail from HR with ID number
- Sample content for Faculty Hire memos
- Example of Basic Technology Questions for Prospective Faculty
- How to attach your Faculty Hire Memo
Faculty Hiring in BearQuest

Naming Conventions

Naming convention – academic departments:

The naming convention for academic departments is “college-department-position”. For example, if the business law department in the business school were requesting a new ethics professor it would be “HSB-BL-Ethics Professor.” If the religion department were requesting a new Old Testament professor it would be “AS-REL-OT professor.” This naming convention will make it much easier to organize and manage the long list of proposals. If you are requesting a faculty hire, include the word “hire” in the name (e.g. HIRE – AS – REL – OT professor).

Preferred abbreviations for the schools:

• College of Arts and Sciences (AS)
• Hankamer School of Business (HSB)
• Honors College (HC)
• Louise Herrington School of Nursing (LHSON)
• School of Engineering and Computer Sciences (ECS)
• School of Education (SOE)
• School of Music (MS)
• School of Social Work (SWO)
• Truett Seminary (TRUETT)

Naming convention – administrative departments:

The naming convention for administrative departments is “department-position.” For example, if an area in ITS were requesting a programmer it would be “ITS-Programmer.”
Faculty Hiring in BearQuest

This is an example of the email that is sent from HR that is your signal that it is OK to start the BearQuest Faculty Hire Process. Note that it includes a Baylor ID number for the candidate. You will need this number when you are completing the EMS information for the hire:

“Please be advised that the background check for Baylor Bear (BU ID 891.xxx.xxx) has cleared. If you have not already done so, please proceed as you deem appropriate; i.e., initiating the hire project, etc.”
Sample Faculty Hire Memos

Sample #1: Memo for faculty with special terms & conditions (start-up) to be included in his/her letter of appointment:

To: Dean
From: Chair

RE: Proposed Offer to Dr. X

On behalf of my colleagues, I am proposing that an offer be made to Dr. X, from another University at the rank of Assistant Professor for an academic year salary of $48,000 beginning in fall 2009. I feel that Dr. X is poised to accept an offer with the following key terms:

Academic Year Salary: $48,000

Rank: Assistant Professor

Credit towards promotion/tenure: 0

Summer ‘10 research: 20% of his 09/10 academic year salary

Start-up Equipment: 25,000 for research equipment, to be purchased over 2 years (09/10 & 10/11)

Moving: Standard Baylor arrangement according to policy

In addition, he should also be provided with a laptop computer, $5,000 in library materials, a furnished office in a Baylor academic building, and departmental operating funds of $4,703. While these items are not to be included in the special terms & conditions of this letter of appointment, they are included in the budget.

We have also delivered hard copies of 1) signatures of the tenured faculty in the department, indicating their support of Dr. X and 2) the Consent and Disclosure Form required for the criminal background check to your office.
Sample #2: Memo for faculty with special terms & conditions (start-up) to be included in their letter of appointment:

To: Dean
From: Chair

RE: Proposed Offer to Ms. Z

On behalf of my colleagues, I am proposing that an offer be made to Ms. Z beginning in fall 2009. I feel that Ms. Z will accept an offer with the following key terms:

Academic Year Salary: $48,000 if degree conferred; otherwise, see note regarding rank

Credit towards promotion/tenure: 0

Start-up Equipment: $30,000 for research equipment, to be purchased over 2 years (09/10 & 10/11)

Rank: Assistant Professor -- if Ph. D. conferred by effective start date, or Lecturer - if Ph.D has not been conferred by start date. In addition, salary for lecturer will be 10% lower that amount agreed to for Assistant Professor.

Moving: Standard Baylor arrangement according to policy

In addition, she should also be provided with a laptop computer, $5,000 in library materials, a furnished office in a Baylor academic building, and departmental operating funds of $4,703. While these items are not to be included in the special terms & conditions of this letter of appointment, they are included in the budget.

We have also delivered hard copies of 1) signatures of the tenured faculty in the department, indicating their support of Ms. Z and 2) the Consent and Disclosure Form required for the criminal background check to your office.
Sample #3: Memo for faculty with special terms & conditions (start-up) to be included in their letter of appointment:

Bear Quest # 4000  
Arts & Sciences – Big Department  
Hire Quincy T. Bear as Professor of Big Department  
And the U.R. Great Chairholder in Big Department  

Proposed Special Terms & Conditions

1. Baylor will commit up to $4,000 in start-up from University funds for the purchase of technology. University funds will be designated in an operating budget account specifically identified for Dr. Bear and must be expended within one year (by August 31, 2010).

2. As the U.R. Great Chairholder, Dr. Bear will be allotted $5,000 per year in travel funds and $15,000 per year for a graduate assistant stipend.

3. A summer sabbatical during Summer 2010, will be provided for two months’ salary equal to 20% of Dr. Bear’s 2009-10 academic year contract equivalent.

4. As an exception to Baylor’s standard moving policy, Dr. Bear will be allotted up to $5,000 beyond the standard moving consideration for moving his household goods from Timbuktu to Waco, Texas.

5. Dr. Bear is required to follow departmental and Baylor purchasing procedures when expending funds noted above.
Basic Technology Questions for Prospective Faculty

Department at Baylor: ________________________________________________

Name: ___________________________________________________________________

E-mail contact through the Summer 2009: _________________________________

Does your current or planned research require the use of high performance computing (computational cluster, mini clusters, and computational workstations)?

What are the networking requirements for your current or planned research? (i.e. high speed connectivity to other universities/research labs, high speed network within lab, wireless)

Do you have any current computer equipment that you would intend to bring to Baylor University? (If yes, please describe)

What operating systems do you use in your research? (i.e. Windows, Linux, Mac, please include version)

Does your research involve data that has government or other organizational security requirements placed on it? (National Security Interest data, social security numbers, personally identifiable information)

Please send your responses to Dr. Viola Osborn, Director of the Arts & Sciences Technology Center: Viola_Osborn@baylor.edu.

Thank you.
How to attach your Faculty Hire Memo

You can attach your Faculty Hire Memo at any point once you have started the request (given it a name and selected a request type).

**Note:** It is a good idea to “save draft” of the form you are completing before attaching any document. Attaching a document may cause you to lose information on the form unless you have saved it.

From any form within BearQuest, click on “View/Add Comments.”
Enter a subject line and message describing the faculty hire memo you are attaching. Then click on “File” in the attachments drop down menu.

Click “browse” to find your file. Once you have selected it, click “save comment.”
Faculty Hiring in BearQuest

Once you have successfully attached your comment, you should see a screen like this.

Click on “Complete your Task” to return to the BearQuest form.