

Search and Screening Guidelines

Faculty and Administrative & Professional Positions

Effective April 11, 2007, revised 7/10 1/11.

Table of Contents

Background

What shapes the hiring procedures at UCF?

Definition of a search

Definition of an internal search

Search committee composition

Hiring Official Guidelines

Role and responsibilities

Appointing a search committee

Search committee structure and organization

Charging the committee

Advertising, and posting on the [UCF Employment Opportunities](#) website

Search Committee Chair and Search Manager Guidelines

Role and responsibilities

Checklist for search committee chairs

Securing supporting documents

Search Committee Guidelines

Role and responsibilities

Style of the search process

Stages of the search: Expectations for screening

Quick checklist on screening guidelines

Search management tips for committees

Minutes and other public documents

Career counseling during search

Appendix A. Definition of Terms Used in the Search and Screen Process

Appendix B. Completing the Faculty File for Post-Hire EO/AA Review

Background

What shapes the hiring procedures at UCF?

The 14th amendment to the U.S. Constitution provides for equal treatment under the law. Various federal and state laws and guidelines expand on that foundation.

Basically, the University responds to federal obligations to prevent discrimination and practice affirmative action because of its status as an employer and a federal contractor. Those laws and guidelines specify that procedures for employment selection must be related to the duties of the position, must be applied fairly, and must include persons from underutilized groups by race and sex.

In addition to the mandates referenced above, as well as various state laws and guidelines, the University of Central Florida has established a goal of becoming more inclusive and diverse. [UCF Regulation 3.001](#), Non-Discrimination; Affirmative Action Programs expands on that goal, which search techniques are intended to support.

The regulation states that the university shall not discriminate in employment terms or conditions on the basis of race, color, religion, sex, national origin, age, disability, marital status, sexual orientation, gender identity, gender expression, and veteran status (as protected under the Vietnam Era Veterans Readjustment Assistance Act). The University's practices ensure that special efforts are made to attract diverse pools of well-qualified applicants, from which excellent candidates can be selected.

Definition of a search

A search is defined as the process of filling a job or position vacancy via public announcement ("posting") and recruitment followed by consideration of all qualified applicants. A search is required for **all** positions in the Faculty, Administrative & Professional, and Senior Executive Service pay plans unless specifically exempted.

For a description of search exemption categories, please refer to the "[Request for Exemption from Posting](#)" form within the EO/AA office website.

Definition of an internal search

An internal search is conducted when a new full-time set of responsibilities is available and no vacant position exists. To review [Guidelines for an Internal Search](#) for faculty positions, please refer to the EO/AA office website.

Search committee composition

A search committee is a group appointed by the hiring official to assist with the search process by screening the applicant pool and recommending potential candidates to the hiring official. A search committee is required for **all** faculty positions that require a search.

A search committee is required for **all** A&P positions at the level of Director and above. For A&P positions below that level, the elements of the search process (outlined in a later section) remain the same, but use of a committee is optional.

Faculty

All regular positions must be filled using approved hiring procedures, including the use of a search committee. Some positions may use a subset of the regular faculty; some may name a committee with all department faculty serving. Others may add members from outside the department to a core of faculty.

Some visiting positions will use a committee. As an example, a position that is posted and advertised may result in an appointment that is renewable for up to four years. A committee is required for such positions.

No committee is needed for a visiting position that is not posted and advertised. Such appointments last no longer than one year (they are not renewable).

Hiring officials are encouraged to consider elements of diversity in their appointments to the search committee. The committee shall include individuals who are knowledgeable about the position being filled, which may include faculty, A&P, or USPS (staff) employees, OPS employees, students, alumni, or other community members.

Hiring officials and search committee members should guard against conflicts of interest. No individual with a conflict of interest in the screening process should be appointed to or continue as a member of the search committee. Potential candidates for the position should not be involved in the establishment of job preferences and screening criteria. It is a conflict of interest for a committee member to participate in support activities for a particular candidate, such as serving as a candidate's reference.

The hiring official is never a member of the committee. The committee is advisory to the hiring official and makes a recommendation, following consideration of all qualified candidates.

Administrative & Professional

All regular positions must be filled using approved search procedures. For guidance, please consult the [A&P Hiring Guidelines](#) published by Human Resources.

Positions at the level of Director or above must be filled using a search committee. It is optional below that level. When no committee is used, an interviewing panel is recommended.

Hiring officials are encouraged to consider elements of diversity in their appointments to the search committee or interviewing panel. The committee or panel shall include individuals who are knowledgeable about the position being filled, which may include faculty, A&P, or USPS (staff) employees, OPS employees, students, alumni, or other community members.

Some visiting positions will use a committee. As an example, a position that is posted and advertised may result in an appointment that is renewable for up to four years. A committee is required for such positions above the level of Director. It is optional below that level.

No committee is needed for a visiting position that is not posted and advertised. Such appointments last no longer than one year (they are not renewable).

Hiring officials and search committee members should guard against conflicts of interest. No individual with a conflict of interest in the screening process should be appointed to or continue as a member of the search committee. Potential candidates for the position should not be involved in the establishment of job preferences and screening criteria. It is a conflict of interest for a committee member to participate in support activities for a particular candidate, such as serving as a candidate's reference.

The hiring official is never a member of the committee. All committees are advisory to the Hiring Official, who must remain in a position to consider the recommendation and make a decision.

Hiring Official Guidelines

Role and responsibilities

The "hiring official" is the person who will make the final decision on the selection. It is understood that further administrative review may take place, but this designation is given to the person who will choose the selected candidate. The search committee, when used, is advisory to the hiring official.

Appointing a search committee

The "hiring official" appoints the committee. The hiring official determines the number of committee members (three or more) and the composition of the membership. The university's Affirmative Action Plan specifies that committees' membership should be diverse. Members should be knowledgeable about the discipline or professional field and available for all or at least most of the meetings.

Search committee structure and organization

Committee appointments may include members of the department; individuals from outside the department who are knowledgeable about the area; community members such as Advisory Board members; students; or alumni. The hiring official names the chair. Diversity is expected on each committee.

Normal committee procedures include face-to-face meetings for organizational purposes, establishment of criteria, discussion of candidates at all later stages, exchange of phone reference information gathered as assigned, exchange of interview reactions if the committee is involved, and the final vote to produce the recommendation to the hiring official. Email may replace in-meeting voting on credentials reviewed

individually, when the criteria do not call for discussion and exchange of ideas. “Polling” the committee individually on criteria interpretations is not seen as an effective substitute for committee interaction at rounds beyond minimum qualifications.

An initial organizational meeting allows the entire group an opportunity to discuss and agree upon each action taken, possibly including recruitment strategies and advertising. It enhances the group’s accountability for a fair and comprehensive search.

Committees normally function on a majority vote basis, with a quorum consisting of a majority of the currently-appointed members. (The actual number for a majority might change during a search if a member resigns or is added.) If a committee prefers a higher standard of attendance or agreement, that should be voted on at the organizational meeting.

Procedurally, the committee is responsible for reviewing the documents that describe the position and taking job-related actions in the screening process. The hiring official should provide to the committee a listing of the teaching areas planned for advertisement or a summary from the A&P position description if the committee will assist in writing the ads. If the committee is established to screen, the hiring official will provide access to the ads placed and other pertinent materials. In the on-line application systems, these documents may be available via guest password.

Charging the committee

All committees are advisory. The hiring official describes the essential functions of the position and discusses the requirements and preferences. After the hiring official charges the committee, the committee periodically communicates progress. The committee normally does this through the minutes of meetings, but also may pose questions during the process.

In cases where the applicant pool is not suitable at some stage, the hiring official may provide clarification to the charge or a new perspective on the criteria and ask the committee to re-screen. Alternatively, the hiring official may take another action to enhance the pool and attract other candidates, or advance additional candidates from the pool, asking the committee to consider them using the original charge.

Advertising, and posting on the UCF Employment Opportunities website

Committees who are involved in the initial search process must set review or closing deadlines. Advertising is expected to reach the appropriate pool of potential applications; sources are chosen by departments. At least one source must be printable. This definition includes websites external to UCF when a printout of a job advertisement can be obtained.

Faculty and A&P searches may be conducted with advertising and recruiting that uses a phrase similar to “review will begin (date) and continue until position is filled.” This entitles the committee to begin review and keep searching as screening progresses.

This system of open posting may be used when an extensive search is seeking candidates from many sources, for maximum flexibility in deadlines.

Timely applicants in open postings should be screened according to the same criteria, within “rounds” or screening stages, as long as they keep advancing. As an example, if most of the applicants have been screened through Round Four already, a new applicant does not proceed directly to Round Four. Minimum criteria are applied at Round One, then subsequent rounds, until the application is declined or the applicant is included with others in the round under consideration.

When the hiring official believes that the search has been successful, the UCF on-line job announcement must be posted with a closing date. This is a required step to close the “open” search. On-line application is required. The system will not accept applications attempted after the established closing date. Therefore, timeliness is determined by on-line application accepted by the system.

The timetable for the rest of the search is shaped by the remaining steps to be taken. If much of the screening has been done before the posted closing date, final screening of applicants (after the job announcement’s closing date) might be the only task left.

Interviewing prior to the closing date is approvable. Caution: no timely candidate who is qualified for an interview can be declined because the interview budget has been expended prior to the closing date. Faculty and A&P searches with open postings must produce minutes which accurately reflect different criteria addressed for different applicants at each meeting.

Departments should be aware that the search criteria must be applied to all timely candidates and interview arrangements should be made on the basis of merit.

Searches are commonly conducted with fixed deadlines; open posting is simply an option. A position should be posted as the search begins; certain posting periods may apply to faculty and to A&P. See Faculty Hiring Guide and A&P Screening Guidelines links on the [EO/AA homepage](#). The closing date also is publicized in the advertisements and recruiting contacts.

In many cases, the screening will proceed round by round, addressing all applicants at once. Minutes are likely to reflect this pattern. With “fixed deadline” searches, it is more likely that each meeting will address one set of criteria for all candidates considered.

Departments planning to hire for “visiting” positions should determine whether candidates with UCF experience have ever served in a non-posted visiting position. Service in a non-posted visiting role is limited to a total of one year for those candidates; they may not serve another non-posted year anywhere at the university. Service in a visiting role (non-posted, posted, or a combination) is limited to a total of four years anywhere at the university. Departments should notify applicants whose service exceeds these limits that they are not eligible for appointment in the visiting role.

Search Committee Chair and Search Manager Guidelines

Role and responsibilities

The “search manager” is the university representative for procedural issues and documentation. That individual normally is considered the custodian of records during the search process. Creation and maintenance of hiring records are the responsibility of the search manager. Coordination with the hiring official and search committee chair is essential for this role.

Checklist for search committee chairs

1. Organization

- Secure committee membership list from hiring official
- Designate the Search Manager, to coordinate records
- Establish acceptable time and location for meetings
- Post meeting notices with Human Resources throughout the faculty or A&P search (see [Sample](#)).

2. Procedures

- Discuss a quorum for committee action, if different from simple majority of total voting members
- Establish the proportion of votes needed to pass a motion, if different from simple majority of total voting members
- Note the opportunity to use Right of Inclusion, a procedure similar to a motion to reconsider
- Establish absentee ballot procedures, if any [note: proxy voting is prohibited]

3. Meetings

- At first meeting, receive charge from Hiring Official, and guidance from EO/AA Office if requested.
- Prepare advertisements and recommend sources for placement, if requested by hiring official. Ensure that the UCF job announcement is prepared and filed.
- Discuss timetable for screening: use date from ads indicating when screening will begin; closing date if already established; desired interview dates; other parameters from hiring official.
- Conduct Round One credentials review [optional: using subcommittees], for minimum criteria (requirements). May review for Round Two and beyond if voting is reserved for candidates still under consideration following Round One.
- Apply Round Two criteria, usually seeking the preferred qualifications; set criteria for further rounds as needed; conduct screening.
- Designate phone reference checks for each candidate. Receive committee members' reports in a meeting. Secure committee members' documentation if available. Advance candidates to interview list and alternates list.
- Arrange interviews as instructed by hiring official.
- Prepare interview results summary and final committee recommendation for hiring official.

- Prepare final committee records in electronic format for use by hiring official.

Securing supporting documents

The on-line application system requires the applicant to complete a timely Application for employment. That form offers the opportunity to voluntarily self-identify race and sex. The log is prepared electronically from that information, so no action by the search manager is required.

Search managers may inform candidates that materials needed for screening or advancement are missing and set a deadline for receipt. The committee may advance only those applicants with completed application packages.

The hiring official is responsible for retention of all public records (such as correspondence and application materials). This role is normally delegated to the search manager. The search manager might be assigned from another administrative area (such as that of the search committee chair). The responsibility includes managing on-line processes and acknowledging materials. All such tasks may be completed via e-mail.

Original documents verifying employment eligibility must be personally observed by a UCF representative (quite often by the Search Manager).

The I-9 form must be completed within three days after the date of hire. Search managers are permitted to ask candidates if they wish to complete the verification process at the time of the campus interview, but they cannot require it.

No candidate can be disadvantaged by not being able to prove eligibility prior to three days after the start date. All candidates are viable whether they verify early or choose not to. If the department selects a candidate whose eligibility needs additional processing, the department should contact the [UCF International Services Center](#) for direction. These situations might include internationally-recruited faculty members, or other applicants whose eligibility needs to be processed or confirmed.

Recommendations and documentation of final selection procedures are to be maintained as part of the faculty search file. These may include committee recommendations; total faculty votes; different levels of approval prior to the Dean, Director, or Vice President; and other steps taken to confirm the selection of the candidate. Documentation is assembled on-line, with various section titles guiding the search manager.

The hiring official will identify the individual responsible for completing the entire advertising and posting process, with the assistance of the search manager. This includes the published advertising, web postings, personal contacts made and documented, and **posting the job announcement [as required]**. This responsibility may be retained by the hiring official's office or delegated through the search committee chair to the search manager, with appropriate direction.

All search materials must be retained for three years so that equal opportunity and affirmative action compliance reviews can be performed. After that, State of Florida records-retention procedures apply.

Search Committee Guidelines

Role and responsibilities

The committee may assist with the search process by recommending wording for advertisements and proposing appropriate advertising venues. In its screening role, the committee reviews the applicant pool in two or more stages, arriving at the individuals to be recommended to the hiring official. The membership may be drawn from the department only; in specialized cases, members also might be selected from other departments and sources external to campus to best serve the needs of the University.

The committee members become familiar with the position requirements and preferences. The hiring official provides a written or verbal charge to members with a search committee chair presiding. That chair commonly has voting privileges like other members, but in certain cases may be appointed to lead the committee without voting.

The committee members assess the EEO Summary after Round One, when they have determined those candidates meeting minimum qualifications. Self-identification of protected class status, by race and sex, is indicated.

A diverse pool of qualified applicants should be reflected on the log or the pool may need to be supplemented. If the search has reasonably reached the appropriate applicant pool but the applicant pool is not diverse, the search may proceed. If broader recruitment actions would reasonably let the university achieve its goal of diversity and inclusiveness, it should be re-opened to enhance the pool.

When the pool is appropriate for consideration, the committee should continue applying criteria as written in all advertising and posting.

The hiring official may assign the committee to perform the preliminary reference checks. The names of those to be contacted may be supplied by the candidates or developed by members. References may be sought from any person who has job-related information about the candidate. The committee will use the results as a screening round. Their votes may be positive or negative to advance each candidate.

Three or more reference checks are standard for UCF faculty. Two or more must be phone references. Committee members are strongly encouraged to call non-listed references to develop a balanced profile of candidates' strengths and weaknesses. In A&P, two or more phone references from a supervisor are required; others may supplement this requirement. Documentation of this step should be produced by each participating committee member. This may include use of the [Telephone Reference Check Form](#). Such documents will be included in faculty files, or uploaded as attachments to the on-line file.

Committees normally are asked to participate in the interviewing of candidates during the campus visit. The format for recommendations might be written comment sheets, decisions/votes at a later meeting, or discussion with the hiring official, among other methods of communication. If written records are created, they should be uploaded to on-line files.

The committee is responsible for collecting documentation of each action taken. This includes criteria applied, action taken on each applicant, and the result of each action (votes to advance, or decline, candidacy; procedures in place; pertinent conversations with applicants during the process). These documents are uploaded to on-line A&P files.

Style of the search process

Technological aides can be useful to increase members' participation in decisions at many steps. Options which are noted below as "approvable" are not required by the EO/AA office. They are offered as possible strategies that may be chosen without need for prior approval.

- Emailed committee scheduling is approvable.
- Emailed "attachments" of minutes circulated for committee review are approvable.
- Website posting of the printed ads, or publication of brief ad wording with a reference to a university homepage posting, is approvable. At least one advertisement must be published on a site external to the university (this may include a website). Other recruitment might include phone calls, discussions at conferences, or other verbal exchanges.
- Conference-call or video-call arrangements for members at another location for one meeting are approvable. (However, face-to-face participation normally is considered the definition of a "meeting".) This flexibility applies only to meetings where the off-site member can participate fully. If the agenda for the meeting includes such actions as a campus interview, or exchange of reference-call results, off-site participation is not sufficient for including that member in a decision-making action.
- Video or telephone "screening interviews" of candidates by committee are approvable. Note: they do not replace a personal interview for finalists.

Stages of the Search: Expectations for Screening

Round One for faculty or A&P always screens for minimum qualifications as specified in the advertisements, recruiting materials, and job announcement.

Faculty ads may indicate criteria that can be measured during screening, such as “degree expected by August 20__.” If Ph.D. candidates are acceptable in the applicant pool, use of the wording quoted above is strongly encouraged.

Faculty or A&P ads which indicate that a specific degree level is “required” are interpreted as “required on the job announcement closing date.”

Posting for a specific degree is interpreted as “required on the closing date.” Candidates whose degree completion can be certified by the degree-granting university prior to a scheduled commencement ceremony may be considered to have achieved the degree. Departments willing to screen faculty or A&P candidates whose degrees are not complete may indicate criteria that can be measured during screening. As an example, “degree expected by August, 20__” may be published. If degree candidates who will be qualified by the date of hire are acceptable in the applicant pool, use of the wording quoted above is required.

“Appropriate experience” for A&P candidates is defined as experience gained within that occupational category. Administrative or professional experience gained in any setting will be valid for meeting A&P minimum qualifications.

Enrollment in the final semester of a required Bachelor’s or Master’s degree will not normally be interpreted as meeting minimum qualifications requiring a degree. If departments wish to consider candidates who are nearly finished, they must advertise and post for “[Level of degree] required by starting date.”

When candidates have OPS experience within the state university system, or when their experience is in the private sector, committees will assess their applications and determine their qualifications. State University System experience in a regularly classified position, however, is to be assessed according to the state occupational classification (professional, clerical, etc.). Clerical experience gained in a regular UCF position cannot be considered professional by the committee. Example: Office Manager is in the Professional category and may be applied to A&P minimum qualifications; Office Assistant is Clerical and may not be.

Quick checklist on screening guidelines

- Round 1 – minimum always. Decision may be made based on materials presented.
- Round 2 – usually identifies those who demonstrate some or all of the preferences.

- Subsequent rounds: categorized to begin the process [i.e. Strong, Moderate, Weak]. May start with “Strong” candidates for screening. Refined criteria should not result in changed, unadvertised criteria.

Ranking candidates: may be done by categories as above. Rating on point values is not recommended because validity is hard to establish. Candidates who are similarly situated should be advanced in categories. Strict adherence to years-and-months criteria is not recommended beyond the minimum level in A&P, where such review often is required.

Subcommittees during the early screening rounds are approvable. Two reviewers per candidate is the standard. A procedure calling for subcommittee results announced to the full committee allows the full committee to vote, and to exercise the right of inclusion if necessary.

- Incomplete applications: this applies only after the initial on-line application is complete. The entire application may consist of that on-line form and supplemental documents. If the applicant did not meet requirements at all stages, that fact may be documented as the reason for not advancing the candidate to the next round. In the best interest of the University, continued attempts to recruit the candidate are entirely appropriate.
- Confidential materials: do not accept. Hold them in a separate file and notify the candidate that the materials did not fulfill the requirement. Seek the applicant’s release of the materials, or new materials to complete the file.
- Withdrawals: the candidate must withdraw on-line.

Search management tips for committees

Absentee voting is approvable at any of the early rounds. (There is no defined number.) Committees should determine the procedures for absentee voting during the organizational meeting, if they envision using it. “Proxy” voting is **not** approvable; it substitutes another person’s judgment for that of the chosen search committee member.

Right of Inclusion (also known as a Motion to Reconsider) process must end before the vote that advances candidates to the interview round. Interview choices are expected to be carried by vote of the committee. During those early rounds, a committee member may request the Right of Inclusion following any vote that excludes a candidate. The committee member specifies why the candidate should have been advanced at this round, compared with the criteria. Committee vote follows this discussion. If passed, the candidate is advanced. If denied, the candidate is not advanced.

Committees should limit the use of the right of inclusion to once per candidate in each search. Use of this procedure should be reflected in the minutes for administrative review. The committee’s option to use this process is assumed; there is no need to adopt this procedure as the search begins.

Use preferences and different screening techniques at round two and beyond. Those techniques are applied by committees using published preferred criteria, reference check information, phone interviews, personal interviews, and other screening techniques.

Screen all candidates.

Communicate with applicants: Departments or search committees determine when to communicate with advanced and non-advanced candidates. Most committees immediately notify those not advanced in early rounds that they will no longer be considered. Committees may determine when to communicate with those still being considered, throughout the search.

It is courteous to let candidates know that phone references are being pursued. Of course, contact with the interviewees is notification of success to that point. It is recommended that alternates be retained at each step in case interviews or offers are not accepted and additional candidates need to be considered.

Extend the search or consider it successful: Evaluate the search after Round One screening and at later stages. Use measures of quality such as depth of the “strong candidates” and “alternates” pool; diversity; acceptance of the interview invitation by three or more candidates. Exceptions may be made if fewer than three interviewees are identified.

Practice affirmative action: Include a diverse group in the interview pool after considering those recommended for inclusion at that level. Document extensive, appropriate recruitment when diversity at this step is not apparent.

Check references thoroughly: Double and triple check negative or neutral references, assuming the committee is using the standard of “excellent references.” Report all job-related comments to the committee. If notes are retained, they may be public documents. They should be retained by the search manager as custodian of the public records. Ask candidates to clarify any inconsistencies between reference results and information they supplied.

Do all that can be done: Committee members have the authority to call anyone with job-related knowledge. Use of a standard format of questions by every member is recommended by the EO/AA Office. Impressions of job-related qualities such as stability, interpersonal skills, and sense of responsibility all are acceptable areas of questioning.

Avoid questions about anything not job-related that might reveal race, disability, or other protected class information such as questions about club affiliations, fraternal organizations, memberships. Service contributions can be discussed if they are relevant to position duties. Further information on interviewing: please call the UCF EO/AA Office with specific questions.

Utilize updated letters of reference (faculty only): Goal of this stage is to determine current opinion of academically or professionally qualified people about this candidate. Letters directed to UCF describing the candidate's fit with the vacant position are most pertinent. Letters that are more than one year old do not help the university meet its goal and are not acceptable. It is the University's decision to categorize the references received as "strong" (or not).

Set the interview expectations: The hiring official will determine who should be part of the interview panel in A&P searches not requiring a search committee. Payment of expenses is the responsibility of the hiring department. Interviews at conferences are "meetings" and do not serve as the candidate's only contact with the University: campus interviews are a standard component of the hiring process.

Responses to common questions about interviewing:

- Interviews when candidates were interviewed recently might not need to be repeated. Occasionally, a candidate is considered for two or more positions a short time apart. If an appropriate opportunity was offered for the candidate to interact on campus with the potential colleagues/supervisors and the supervisors recently have interviewed the candidate appropriately for the other positions, a repeated interview may be unnecessary.
- A department offering several identical positions at the same time may consider all applicants for all the positions. Notice to that effect should appear in ads and postings. As an example, the ad might read, "Applicants for these Instructor positions will be considered for all three vacancies." Cross-referencing is especially important in similar A&P searches: "Applicants requesting consideration for similar positions X and Y must apply on-line for each."
- A department offering several similarly-titled positions at one time should notify candidates that an application to one does not place them in the pool for the other. As an example, a department might offer two A&P Coordinator positions, one that will edit academic materials and one that will lead orientation segments. The skills are such that applicants' materials will not showcase them for each position. Applicants for one position should be notified that the other requires a separate application prior to the closing date.
- Interviews of internal candidates should be similar to those offered to externals. Equal opportunity guidelines call for offering the same experiences for all candidates to succeed in the search. No matter how well the candidate knows search committee members or the hiring official, the interview opportunity to discuss plans, goals, and experiences is standard. Interim appointees: same theory. Tours of campus, or briefings by related departments, might be skipped.

Use the interview stage for bona fide competition: Scheduling three or more applicants for interviews is common practice for faculty and A&P. This supports university policy and federal selection guidelines that the interview stage of the selection process is competitive. Two interviewees would be a rare circumstance. Reconsideration of the alternate pool would be recommended.

When several identical positions are available, interview numbers may be adjusted. The goal is to leave three interviewees in contention when a selection is made. If two positions are available, four interviewees would be the minimum. If three are available, five interviewees would be acceptable.

Objectives for interviews: Assess individuals' abilities and desire to perform the essential functions of the position. The hiring official and the committee have already documented which skills are important for performing the previously-defined duties of the job.

Some discussion of expected salary may be made at the interview, but departments are encouraged to explore only (not commit). Note: Under no circumstances may an offer or a guarantee of a position be made prior to issuance of an Employment Agreement.

Use various techniques to seek best information about candidates: Telephone and video interviews are acceptable methods of screening. Visiting with candidates at conferences is encouraged. None of those techniques substitutes for on-campus interviews; the interaction with prospective colleagues at various levels and the visit to the actual job setting are standard components of the UCF recruitment and selection process.

Offer equity in funding: Expenses to be paid for each candidate must be consistent. Similar arrangements for travel, lodging, and other necessities should be offered to all interviewees. All expenses are borne by the hiring department, unless other arrangements have been confirmed in special circumstances.

Include all voting members in final vote: Assessment of the best candidates is the main purpose of the screening process. It is one of the committee's last but most important tasks. Include the whole committee, in person if at all possible. The committee will advance the approximate number of candidates requested by the hiring official. The format might be "names, strengths and weaknesses" or just "names in no order." Minutes or a memo recording this action should be included in the search file. In the A&P on-line file, the minutes may appear below the Meeting Notice or be uploaded as an attachment.

Finish the process with an offer: The hiring official's final responsibility is presentation of an approved written offer to the selected candidate. Hiring officials may inform selected candidates of recommendation and time frame prior to official offer. This encourages candidates to continue considering the university. However, only an authorized offer is considered an offer.

Minutes and other public documents: Minutes include the decision points of the committee, the criteria for each round, and how they were applied. They should refer to each candidate by name and action taken. Detailed discussion need not be recorded.

Committees should remind candidates to notify persons providing references that their comments are public documents. Confidential materials are to be retained in a separate file and not presented to the committee. Search Managers should contact the candidate and say the materials cannot be accepted because they cannot be made public. The candidate may allow them to be used by UCF or seek another letter from another source.

Jotted notes used in meetings, such as those made during phone call reference checks, usually are not public unless retained by members or placed in the hiring file. Persons called during reference checks should be advised that their comments will be discussed in a public meeting and used in making the selection decision. Written absentee votes or committee tallies are usually public documents if retained.

Career counseling during the search: Candidates might request specific responses to questions during the search process. This may take the form of asking for guidance about improving their credentials for the future, or asking why they did not advance in this search. No committee member, Search Manager or Hiring Official is required to provide verbal details on the process or actions. The minutes are public documents and are expected to convey accurate descriptions of actions taken. The procedure for [requesting public documents](#) is available from the EO/AA website.

Appendix A.

Definition of Terms Used in the Search and Screen Process

Posting:

UCF Employment Opportunities are posted on-line. Closing date may change if original start date cannot be met; if ads do not appear in a timely manner; or if enhancement of the pool is desired. If material changes were made to qualifications at any time, re-advertising is necessary to attract the appropriate pool. (Also see “Advertising.”)

Posting approval process:

Posting is generated by the hiring department. It is approved by officials responsible for the hire.

Advertising:

Sources developed by each department for each vacancy. As an example: academic or professional journals; publications targeted for ethnic minority group members, women, veterans, person with disabilities; listserves that reach organization members; notices in newsletters; notices on conference placement bulletin boards; letters to accredited degree-granting programs; examination of departmental adjunct pools; contacting all historically African-American or Hispanic universities with departments/units in the area of the vacancy; reviewing recent searches of a similar nature and contacting potential applicants; contacting the Career Resources offices in the state or region for registered alumni in the preferred field; individual approaches to leading scholars or emerging scholars based on scholarly presentations at conferences; and any other contact that might attract a highly-qualified and diverse pool of candidates.

Ad approval process:

Ads may be e-mailed to EO for review as a service of the office, not a procedural requirement. Required elements of all ads placed by the university:

- Position number, class code, and title for use in verification that minimum requirements are appropriate for faculty. A&P positions must advertise and post “requirements” exactly as designated by HR classifications. Those are the only requirements that may be set. All other job-related qualifications must be listed as “preferences.”
- EEO statement and public documents statement.
- Application deadline, or indication for open postings that “screening will begin [on X date] and continue until position is filled.” When closing dates are used, they should be identical in all publications.
- All ranks to be considered, faculty teaching areas, or statement “other areas will be considered” for maximum flexibility.
- Qualitative and quantitative criteria, such as education, experience, or abilities. Note “required” or “preferred.” “Required” criteria are set by the hiring official for faculty; they are reserved for criteria set by HR classifications, in A&P postings. Required criteria are evaluated as of the closing date. Departments may choose other language for criteria not required on that date: degree expected by time of hire; degree required by (date); degree in final stages of completion, as examples.
- Actual classification titles, along with working titles published to attract applicants.

Public Meetings:

Committees should [announce](#) all meetings. Members of the public may attend. It is important to note that committee interaction with the visitors is not required. The agenda of the committee is for the committee members to discuss business; it does not normally include a public forum. The form to announce these meetings is available on the Human Resources website.

A representative from EO/AA may meet with the committee at its first meeting to discuss procedures, communicate information, and answer questions. This is a service of the office, not a procedural requirement.

Recruiting:

Calling major professors for recommendations of new graduates; calling leaders in field for recommendation; talking to potential candidates at conferences; talking to leaders in field at conferences and securing names that can be contacted later; signing up to interview interested people through a conference placement service; putting an ad on Careerbuilder.com or other employment-oriented listserve; personal contact with trusted colleagues and potential candidates. Phone calls and personal contacts are encouraged. Reviewing *curriculum vitae* received in other years or companion searches. Interviewing at conferences does not replace on-campus interviews, but it can provide an opportunity to recruit a candidate by pre-screening and communicating your preliminary assessment of suitability.

Successful recruiting:

A diverse pool of well-qualified candidates through the interview stage. "Diverse" is defined as representation including men and women of at least two race/ethnic groups. Candidates must be drawn from the appropriate recruiting area as documented in the Affirmative Action Plan, developed with input from Vice Presidents and Deans.

Letter of Reference:

Written records provided by colleagues/supervisors who address job-related qualifications of the candidate. Best letters: directed to UCF, specific to the vacancy, describing job-related qualifications, dated in the past year. Exceptions may be made when the reference has not worked with the candidate for some time, or in other special circumstances. A letter of reference may be an e-mail to the UCF search manager. It must be dated, should contain verifiable contact identification, and be printed for the hiring file.

Telephone Reference Record:

Written records created by committee members or hiring officials following phone calls to colleagues/supervisors.

Appendix B. Completing the Faculty File for Post-Hire EO/AA Review

Checklist

The Hiring Official reviews the complete faculty file and assures that it is consistent with federal, state, and university policies. Further monitoring reviews follow established policies.

The complete folder contains all elements listed on the Academic Affairs [Faculty Hiring Checklist](#). In Provost's website, see Forms tab, Faculty Hiring Package Checklist.

UCF EO/AA revised 2/07, 7/10, 1/11