

University of Central Florida
Office of Institutional Equity
Search and Screening Guidelines

Faculty and Administrative & Professional Positions

Effective April 11, 2007, revised 7/10, 1/11, 6/13, 8/13, 9/14, 3/15, 3/17, 5/17

Table of Contents

[Background](#)

Why UCF uses search committees
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 OIE Review](#)

Background

Why UCF uses search committees in the hiring process

UCF responds to federal obligations to prevent discrimination and practice affirmative action because of its status as an employer of 15 or more and a federal contractor. Those laws and guidelines specify that the University must fairly apply procedures for employment selection, relate the criteria to the duties of the position, and include in the process persons from groups currently underutilized 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, and the UCF search guidelines support the regulation.

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, sex identity, sex expression, and veteran status (as protected under the Vietnam Era Veterans Readjustment Assistance Act). The University takes specific actions to attract diverse pools of well-qualified applicants, from which hiring officials can select excellent candidates.

Definition of a search

A search involves screening all qualified applicants for a vacancy following public announcement (“posting”) and effective recruitment. UCF requires a search for **all** positions in the Faculty and Senior Executive Service pay plans, as well as Administrative and Professional positions at the Director level and above.

There are specific exemptions in limited circumstances. For a description of search exemption categories, please refer to the “[Request for Exemption from Posting](#)” form and guidelines under FORMS in the OIE office website.

Definition of an internal search

UCF conducts an internal search when no vacant position exists to support a new full-time set of responsibilities. Example: full-time Associate Dean responsibilities filled by a member of the college’s faculty. To review [Internal Search](#) guidelines for faculty positions, please refer to the OIE office website. Internal searches require OIE to pre-certify exemption from posting.

Administrative appointments for responsibilities less than full-time require no internal search. Example: full-time faculty member who coordinates the graduate program in exchange for course release.

Search committee composition

A search committee is a group of at least three members appointed by the hiring official to assist with the search process on an advisory basis. All members must be knowledgeable about the vacant position and free from conflicts of interest. It is most common for faculty members from the unit to comprise the majority of the committee for faculty positions and for A&P staff members to comprise the majority for A&P vacancies. However members may include faculty, staff, student, community member, advisory board member, or a non-voting member from another unit or department, as examples. Members must follow University procedures to screen each applicant in the pool and recommend candidates to the hiring official in the requested format. OIE encourages hiring officials to make best efforts to assemble a search committee that represents a diversity of intellectual and professional experiences and backgrounds.

Faculty hiring

UCF fills all regular faculty positions using approved hiring procedures, including the process of a search committee, with one exception. An applicant for a faculty position may be hired without having been screened by a search committee when she or he is hired through the Targeted Opportunity Program (TOP). The Provost, or official designee, will make the final authorization to extend an offer to a TOP candidate. Please be aware that if the Provost decides not to extend an offer to a TOP candidate, in order to hire the candidate she or he must apply to a regular posting and must be screened by a search committee through the regular process (unless the candidate is otherwise exempt from posting).

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. UCF requires a committee for renewable visiting positions.

The hiring official may fill a one-year, non-renewable visiting appointment without a committee or posting in the University's listing, JobsWithUCF.com. This creates an exemption to the established search procedures requiring a posting for all vacancies. Such appointments last no longer than one year. They are not renewable. The hiring unit cannot extend them. The appointment ends after one year. The University cannot make an exemption to an exemption.

Hiring officials and search committee members should guard against conflicts of interest during the process. While no hiring official should appoint an individual with an unresolved conflict of interest in the screening process, committee members also should identify and resolve conflicts that arise during the search.

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 committee is advisory to the hiring official; therefore, the hiring official may not serve on the search committee.

The committee makes a recommendation, following consideration of all qualified candidates.

Administrative & Professional hiring

UCF fills all regular positions using approved search procedures. For guidance, please consult the [A&P Hiring Guide](#) published by Human Resources.

Positions at the level of Director or above use a search committee. It is optional below that level. When no committee is used, HR may recommend an interviewing panel.

Hiring officials and search committee members should guard against conflicts of interest during the process. While no hiring official should appoint an individual with an unresolved conflict of interest in the screening process, committee members also should identify and resolve conflicts that arise during the search.

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 committee is advisory to the hiring official; therefore, the hiring official may not serve on the search committee. The committee makes a recommendation, following consideration of all qualified candidates.

Hiring Official Guidelines

Role and responsibilities

The "hiring official" is the person who will select the candidate to fill the vacancy. Further administrative review may take place. The search committee is advisory to the hiring official; therefore, the hiring official may not perform search committee functions.

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 by race/ethnicity and sex. 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, who usually is a voting member.

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, and the final actions to produce the recommendation to the hiring official. Email may replace a meeting to vote on credentials reviewed individually, when the criteria do not call for discussion and exchange of ideas. This is most common at the first screening round. OIE recommends against “polling” the committee individually on criteria interpretations at rounds beyond minimum qualifications.

An initial organizational meeting allows the entire group an opportunity to discuss and agree upon each action planned. The hiring official may request committee input on recruitment strategies and advertising.

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 the hiring official adds a member or a member resigns.) 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. The hiring official may charge the committee just to screen from 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. The hiring official specifies the requested work product: a list of acceptable candidates or a list of all interviewees setting forth their strengths and weaknesses. The University has determined that the candidates should not be numerically ranked when provided to the hiring official. 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; posting on the JobsWithUCF.com website

Committees who are involved in the initial search process must set review or closing deadlines. University procedures require advertising reasonably expected to reach the appropriate pool of potential applications; the hiring official approves the sources. At least one source must be printable. This definition includes websites external to UCF that can provide a printout of a job advertisement.

Make sure the job description in the posting is clear and specific. Make sure the minimum qualifications and preferences that you decide upon are job-related in that they are calculated to predict excellent job performance. Consider broadening your view of what level or kinds of knowledge, skills, and abilities can be predictive to better reflect diversity in the discipline and/or experiences of applicants.

Use the appropriate equal opportunity and affirmative action language in all postings: “UCF is an equal opportunity/affirmative action employer. All qualified applicants are encouraged to apply, including minorities, women, protected veterans, and individuals with disabilities. As a Florida public university, UCF makes all application materials and selection procedures available to the public upon request.”

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. The search may use this open posting system when an extensive search is seeking candidates from many sources. It provides maximum flexibility in deadlines.

The committee should screen timely applicants in open postings according to the same criteria, within “rounds” or screening stages, as long as they keep advancing. If the committee has screened most of the applicants through Round Four already, a new applicant does not proceed directly to Round Four. The committee applies minimum criteria at Round One, then subsequent rounds, until the committee no longer includes the candidate with others in the round under consideration.

When the hiring official believes that the search has been successful, the search must post with JobsWithUCF.com and specify a closing date. This is a required step to close the “open” search. On-line application is required for every individual considered for selection. The system will not accept applications attempted after the established closing date. Therefore, the system performs the screening for timeliness. That is an essential element in determining a qualified individual.

The remaining steps shape the timetable for the rest of the search. If the committee completes much of the screening before the posted closing date, final screening of applicants after the closing date might be the only task left.

Interviewing prior to the closing date is approvable. Caution: the search cannot deny a timely candidate who is qualified for an interview because the search expended the interview budget prior to the closing date. Faculty and A&P searches with open postings must produce minutes that accurately reflect different criteria addressed for different applicants at each meeting.

Departments should be aware that they must apply search criteria to all timely candidates and offer interviews based on comparative merit.

Searches commonly use fixed deadlines; open posting is simply an option. Departments should post the position as the search begins; certain posting periods may apply to faculty and to A&P. See Faculty Hiring Guide and A&P Hiring Guide links on the [OIE 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 at any time. Service in a visiting role (non-posted, posted, or a combination) is limited to a total of four years anywhere at the university for faculty and for A&P at this writing. Departments should notify applicants whose service exceeds the limits that they are not eligible for appointment in the visiting role.

Search Committee Chair and Search Manager Guidelines

Role and responsibilities

The “search chair” organizes and leads meetings. The chair is responsible for leading the committee through University procedures to the final form of input that the hiring official requested.

The “search manager” is the university representative for procedural issues and documentation. That individual creates, maintains, and serves as the custodian or records during the search process. 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 present for the meeting. “Present” may mean electronic communication such as phone or videoconference.
- 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 OIE if requested
- Prepare advertisements and recommend sources for placement, if requested by hiring official. Ensure that the UCF posting 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, for minimum criteria (requirements). May review for Round Two and beyond but hold votes until the committee receives the Round One results. The committee would records a vote only for candidates who met qualifications at 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. All interviewees must advance from the reference-check round except in limited circumstances. In such rare cases, the committee must complete the reference checks on all interviewees. Arrange interviews as instructed by hiring official
- Prepare interview results summary and final committee recommendation for hiring official (uploading search documents to online system or compiling files)
- Prepare final committee records for use by hiring official (uploading search documents to online system or compiling files)

Securing supporting documents

The on-line application system requires the applicant to complete a timely Application for employment. Applicants may self-identify race/ethnicity and sex, voluntarily. The log is prepared electronically from that information. No action by the search manager is required.

Search managers may set a deadline for receipt of supplemental application materials.

The committee should advance only those applicants with completed application packages including the required online application.

The hiring official is responsible for retention of all public records (such as correspondence and application materials) and may delegate this role to the search chair during the search. The search chair may delegate this role to the search manager during the search. The search manager might work in an area other than the hiring department (such as that of the non-departmental search committee chair). The search manager coordinates online processes and acknowledges supplemental materials. Search managers may use email for all such communications.

The University cannot disadvantage a candidate by requiring proof of employment eligibility more than three days prior to the start date. All candidates are viable whether they use the e-Verify system early or choose to wait. If the department selects a candidate whose eligibility needs additional processing, the department follows University procedures for e-Verify. This information may apply to any applicants when the University needs to process or confirm employment eligibility, such as internationally recruited faculty members.

Faculty search files include recommendations and documentation of final selection procedures. 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.

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]**. The hiring official may retain this responsibility or delegate it through the search committee chair to the search manager, with appropriate direction.

The University must retain all search materials for three years for potential equal opportunity and affirmative action compliance reviews. 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 choice of individuals they present to the hiring official. The hiring official may have drawn their membership from the department only. In other searches, the hiring official may appoint members from other departments and external sources 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 lead the committee without voting.

For A&P positions, the committee members assess the Departmental EEO Report after they have determined those candidates meeting minimum qualifications. That online report indicates self-identification of protected class status by race/ethnicity and sex.

If there is diverse pool of minimally qualified applicants, defined as two males and two females of at least two different racial/ethnic groups, the search may proceed. If the search has reasonably reached the appropriate applicant pool through robust and effective recruitment 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, recruitment should continue to enhance the applicant pool.

For Faculty positions, committee members should contact the University's Chief Diversity officer or the OIE office for assistance in determining whether the minimally qualified applicant pool is diverse or whether additional recruitment efforts should be made.

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

The hiring official may assign the committee to perform the preliminary reference checks. The candidate may supply contact information, but search committee members develop the most effective contacts. The committee may seek references from anyone who has job-related information about the candidate. The committee should concentrate its questions on the likely success of the individual in the posted position, but also should validate the c.v. (position title, dates, responsibilities).

If the committee identifies inconsistencies between the c.v. and the reference check or other authorized sources of information, the committee should take effective steps to determine accurate information. The committee may develop information from online resources that are job-related, such as search engines that return results verifying

academic presentations or descriptions of current employment. The committee may use such employment-oriented sites as LinkedIn.com.

OIE strongly recommends against developing employment-related information from personal websites or social media sites.

The University takes several measures to offer voluntary self-identification: confirming on the application that race, sex, and disability identification is voluntary, eliminating “date of high school graduation” from all applications, asking about employment eligibility instead of national origin, as examples. Committees who use personal sources may acquire personal information. A non-selected candidate may believe that the committee relied on non-permissible factors such as sexual orientation or disability status, viewed only on a social site.

The best source for an explanation is the candidate.

The committee will use the results as a screening round. They will vote to advance each candidate, yes or no.

Faculty positions require three or more reference checks. Two or more must be phone references rather than written. Academic Affairs and OIE strongly recommend that committee member 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.

Each committee member is responsible for documenting this step. This may include use of the [Telephone Reference Check Form](#). Such documents will be included in faculty files or uploaded as attachments to the online file.

Hiring officials normally ask committees 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 the committee creates written records, they must preserve them.

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; procedures in place; pertinent conversations with applicants during the process). The committee preserves these documents (and uploads them to online A&P files).

Style of the search process

Technological aides can be useful to increase members’ participation in decisions at many steps. OIE notes the following “approvable” options but requires none. They are possible strategies that committees may choose without need for prior approval.

- Emailed committee scheduling
- Emailed “attachments” of minutes circulated for committee review
- Website posting of the printed ads, or publication of brief ad wording with a reference to a university homepage posting. 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 calls or videoconferencing arrangements for members at another location for one 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 the committee. 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 the committee can measure during screening, such as “potential for research program in areas including (subdisciplines)” or “experience in online instruction.”

OIE defines the job announcement closing date as the date to measure a required degree level or other credential. If Ph.D. candidates are acceptable in the applicant pool, OIE strongly encourages posting “terminal degree required by time of hire” or “ABDs considered.”

Committees must screen for a specific degree level required in a posting by verifying degree award on or before the closing date for the posting. Committees may consider a degree completed if the candidate’s degree-granting university certifies it in advance of a scheduled commencement ceremony. Departments willing to screen faculty or A&P candidates whose degrees are not complete should indicate criteria that they can measure 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, the posting must reflect that.

Human Resources will assist committees in clarifying “appropriate experience” for A&P candidates. Normally, it includes experience gained within that occupational category. Administrative or professional experience externally or at UCF will be valid for meeting A&P minimum qualifications.

Enrollment in the final semester of a required Bachelor's or Master's degree does not meet minimum qualifications for those degrees. If departments wish to consider candidates still enrolled, they must advertise and post for "[Level of degree] required by starting date."

When candidates have OPS experience within the University, or when their experience is external, committees should assess their applications and determine their qualifications. Committees should assess UCF experience in a regularly classified position according to the occupational classification (professional, clerical, etc.).

Quick checklist on screening guidelines

- Round 1 – minimum always. Committees should base decision on materials presented.
- Round 2 – usually identifies those who demonstrate some or all of the preferences.
- Subsequent rounds: results 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.

OIE discourages rating on point values because validity is questionable. Committees should advance similarly situated candidates in cohorts. OIE discourages strict adherence to years-and-months criteria beyond the minimum level in A&P, where such review often is required.

Committees may work in subcommittees during the early screening rounds however all committee members must review each applicant. 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, the committee may document that fact as the reason the candidate did not advance. 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 online.

Search management tips for committees

Absentee voting is approvable at any of the early rounds. 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 appointed 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. Majority vote determines the interview choices. 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 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 per round in each search. A committee member may invoke the right of inclusion more than once during a search. The minutes should reflect use of this procedure in the minutes for administrative review. This is a standard procedure, which does not require adoption by the committee.

Use preferences and different screening techniques at round two and beyond. Committees apply those techniques using published preferred criteria, reference check information, phone interviews, personal interviews, and other screening techniques.

Screen all candidates and record the results of votes on all.

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 are no longer under consideration. Committees may determine when to communicate with those still under consideration, throughout the search.

It is courteous to let candidates know that phone references are scheduled. Of course, contact with the interviewees is notification of success to that point. OIE recommends that committees retain alternates at each step in case interviews or offers are not accepted and they need to consider additional candidates.

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. OIE may consult when a search identifies fewer than three interviewees.

Practice affirmative action: Include a diverse group in the interview pool after considering those recommended for inclusion at that level. Document robust, effective recruitment if the pool is not diverse.

Check references thoroughly: Double and triple check negative or neutral references, assuming the committee is using the standard of advancing candidates only with excellent references. Verify position titles, dates of employment, and duties. 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. OIE recommends use of a standard format of questions by every member. 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, or memberships. Questions may cover service contributions if they are relevant to position duties. Further information on interviewing: please call the UCF OIE 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 "excellent" (or not).

Set the interview expectations: 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:

- Committees need not repeat an interview when the University interviewed a candidate recently for a similar position. Occasionally, a candidate interviews for two or more positions a short time apart. If the candidate had an appropriate opportunity to interact on campus with the potential colleagues and supervisors, the University may consider those earlier results without a second interview.
- 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. The

posting for one position should notify applicants 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. The itinerary might skip tours of campus or briefings by related departments.

Use the interview stage for bona fide competition: Scheduling three or more applicants for interviews is the University's 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. OIE would recommend reconsideration of the alternate pool and consideration of supplemental recruiting first.

When several identical positions are available, the hiring official may adjust the number of interviews. The goal is to leave three interviewees in contention after each selection. If the department has two positions available, four interviewees would be the minimum. If the department has three, 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 duties.

OIE discourages committees from discussing salaries. The hiring official will do so. Note: Under no circumstances may the hiring official extend an offer or a guarantee of a position 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: Similar arrangements for travel, lodging, and other necessities must be consistent for all interviewees. All expenses are borne by the hiring department, unless the hiring official confirms other arrangements 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 possible. The committee will

advance the approximate number of candidates requested by the hiring official. The format might be “names, strengths and weaknesses” or “names of acceptable candidates in alphabetical order.” Minutes or a memo recording this action should be included in the search file.

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 timeframe prior to official offer. This encourages candidates to continue considering the university. However, the University only considers an Employment Agreement as an authorized offer.

Minutes and other public documents: Minutes include the decision points of the committee, the criteria for each round, and the applicants advanced or not advanced. They should refer to each candidate by name and action taken. The minutes are not a transcript; they provide no detail of discussion.

Committees should remind candidates to notify persons providing references that their comments are public documents. Search managers must retain confidential materials in a separate file not presented to the committee. Search Managers should contact the candidate and say that the search cannot accept the materials. The candidate may allow use by UCF or seek other materials from another source.

Jotted notes used in meetings, such as those made during phone call reference checks, usually are not public unless members retain them or submit them as their vote. Committee members should advise references that the committee member will discuss their comments in a public meeting and the committee will use their comments in making the decision to advance the candidate. Written absentee votes or committee tallies usually are 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 convey accurate descriptions of actions taken. The procedure for [requesting public records](#) is available from the OIE website.

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

Posting:

UCF listing at JobsWithUCF.com. Closing date may change if the original start date changes, if ads do not appear in a timely manner, or if the hiring official enhances the pool with further advertising. If the hiring official makes material changes to qualifications at any time, re-posting and re-advertising is necessary to attract the appropriate pool. (Also see “Advertising.”)

Posting approval process:

Appropriate administrative offices may be involved in approval prior to posting the terms and conditions developed by the hiring official.

Advertising:

Sources developed by each department to attract a diverse pool of qualified candidates for each vacancy. Examples:

- academic or professional journals (online or in print)
- publications targeted for ethnic minority group members, women, veterans, person with disabilities (online or in print)
- listserves that reach organization members
- academic or professional newsletters
- conference placement sources
- accredited degree programs
- departmental adjunct pool lists
- historically African-American or Hispanic universities with departments/units in the area of the vacancy
- career resources offices in the state or region for registered alumni in the preferred field
- any other contact that might attract a highly-qualified and diverse pool of candidates

Ad approval process:

Hiring officials may email ads OIE for review as a service of the office. This is 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. Ads must list all other job-related qualifications as “preferences.”
- OIE 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 under consideration, 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.” The hiring official sets the “required” criteria for faculty. HR has established minimum criteria for A&P classifications. Departments may choose flexible language to indicate 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 OIE 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:

Actions taken by the University to attract candidates, beyond the use of printed sources. Examples of effective recruiting techniques:

- 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
- individual approaches to leading scholars or emerging scholars based on scholarly presentations at conferences
- signing up to interview interested people through a conference placement service. 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.
- putting an ad on Careerbuilder.com or other employment-oriented listserve outside the field
- engaging in phone and personal contact with trusted colleagues and potential candidates. records of recent searches of a similar nature
- reviewing c.v.'s received in other years or companion searches

Successful recruiting:

A diverse pool of well-qualified candidates through the interview stage. The standard minimally diverse applicant pool includes at least two female applicants and two applicants representing different racial or ethnic groups. The recruitment must reach

candidates 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: when the reference has not worked with the candidate for some time, or in other special circumstances. A letter of reference may be an email 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 OIE 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-Policies-Procedures link, Faculty Hiring Package Checklist.

For further information, please contact:

Office of Institutional Equity
University of Central Florida
12701 Scholarship Drive,
Suite 101

Orlando, FL 32816-0030
Telephone (407) 823-1336
oiie@ucf.edu
www.oiie.ucf.edu

UCF OIE revised 2/07, 7/10, 1/11, 6/13, 8/13, 9/14, 11/14, 3/15, 3/17, 5/17