



# **College of Sciences Department/School Leadership Training Series**

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Session 2

August 23, 2024

# AGENDA

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FACULTY SEARCH PROCESS – STEPHANIE HERON

FACULTY HIRING CONSIDERATION – STEPHANIE HERON

FACULTY CREDENTIALING (FQMS) – KERSTIN HAMANN

## FACULTY SEARCH PROCESS

STEP 1: PREPARE FOR THE SEARCH

STEP 2: ORGANIZE THE SEARCH & HIRE PROCESS

STEP 3: SEARCH COMMITTEE SELECTION

STEP 4: THE RECRUITMENT PLAN

STEP 5: SEARCH COMMITTEE MEETINGS

STEP 6: SCREENING PROCESS

STEP 7: AFTER FINALISTS' INTERVIEWS & PRE-OFFER

STEP 8: OFFER

# STEP 1: PREPARE FOR THE SEARCH

- When position is approved and funded, request PNR from Budget
- Develop a [Recruitment Plan \(ucf.edu\)](https://ucf.edu)
  - As specific as possible
  - Clearly defined responsibilities
  - Quantifiable required & desired qualifications
  - Specialty areas for external postings

Revised: 10/2022

## UCF Faculty Search & Screening Process

### RECRUITMENT PLAN

Purpose: Proactive recruitment has relevance for both diversity and organizational mission. This form is used by the Hiring Official, Search Committee Chair or Search Manager to document good faith recruitment efforts.

Prepared By: The Hiring Official (with Search Committee input, if requested).

Submitted By: The Search Manager is responsible for making sure the Recruitment Plan is uploaded to the Job Requisition in Workday for the Office of Institutional Equity's review and approval.

Position Title:  Job Requisition:

College/Department:  Hiring Official:

Check One:  External Search  Internal Search Search Manager:

Search Committee Members:

Have all search committee members completed training?  Yes  No (Contact OIE to obtain member access to training module.)

List Names of Search Committee Members below:

Please list recruitment sources for the following searches below:

External searches, list the journals, publications, discipline-based networks, job boards, and other media outlets where the committee's ad will be (has been) placed. Also list letter/email campaigns to potential candidates and/or promotions at professional meetings/conferences. Submit list separately if more space is required.

Internal searches, list the departments and colleges (where appropriate) that you will email (have emailed) the vacancy to invite current employees to apply. Also list any college/department meetings where vacancy was announced.

# STEP 1: PREPARE FOR THE SEARCH

- Ensure all committee members have completed Search Training in Workday

The screenshot shows a Workday interface for a completed course. The main content area on the left includes a 'COMPLETED' status with the date 'Apr 9, 2024', the course title 'Search Training', a description of the course content, and contact information for the Office of Institutional Equity. Below this is a navigation bar with 'Lessons in This Course' and 'Additional Course Details'. The 'Lessons in This Course' section shows a progress indicator 'Completed 1/2' and a list of lessons, with the first lesson 'Search Training module' marked as completed. On the right side, there is a course card with a 'View Course Again' button, a 'COMPLETED' status, and course details: Duration (45 minutes), Lessons (2), and Delivery Mode (Self-Directed).

COMPLETED Apr 9, 2024

## Search Training

This course informs those involved with the hiring process at the University of Central Florida about best practices, rules, and state and federal laws that must be applied when conducting an employee search. It also provides guidance on how a search committee should function.

Questions? Contact [oi@ucf.edu](mailto:oi@ucf.edu).

[Lessons in This Course](#) [Additional Course Details](#)

Lessons in This Course Completed 1/2

✓ [Search Training module](#) → Media

Review this material and complete the Knowledge Check to verify completion. Printable toolkits are...

Office of Institutional Equity

## SEARCH TRAINING

ONLINE COURSE

[View Course Again](#)

COMPLETED

Duration	Lessons
45 minutes	2
Delivery Mode	
Self-Directed	

# STEP 1: PREPARE FOR THE SEARCH / STEP 2: ORGANIZE THE SEARCH & HIRE PROCESS

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- STEP 1: PREPARE FOR THE SEARCH CONTINUED
  - Submit recruitment plan to your HRBC contact so they can internally route approval through HRBC & FBC to create the job requisition
  - Posting Changes should be kept to a minimum and require FE-PA and OIE approval
- STEP 2: ORGANIZE THE SEARCH & HIRE PROCESS
  - Exemptions from posting require OIE approval (interim/visiting, named in grant, internal search, etc.) [RequestforExemptionfromPostingForm.pdf \(ucf.edu\)](#)
  - Visiting Appointments
    - Renewable vs. Non-renewable

## STEP 3: SEARCH COMMITTEE SELECTION

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- Chairs/Directors (Hiring Manager) may not serve on the search committee or engage in activities that may influence the search committee's process/role
- Search committee ideal size is 3-5 members (minimum of 3)
  - Knowledgeable about the discipline/ professional field and requirements
  - Available to attend all, or at least most of the search-related meetings and interviews

## STEP 3: SEARCH COMMITTEE SELECTION

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### Search Participants' Roles & Responsibilities

- Hiring Manager Role [Checklist-HiringManager.pdf \(ucf.edu\)](#)
- Search Committee Chair Role [Checklist-SearchCommitteeChair.pdf \(ucf.edu\)](#)
- Search Committee Member [Checklist-SearchCommitteeMember.pdf \(ucf.edu\)](#)
- Search Assistant Role [Checklist-SearchAssistant.pdf \(ucf.edu\)](#)



## STEP 4: THE RECRUITMENT PLAN

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- Documentation of proactive recruitment strategies to reach a broad, qualified and inclusive pool of potential applicants
  - At least one advertisement must be published on a site external to the university
  - OIE will review the plan to ensure it addresses Affirmative Action Plan goals
    - Recruitment Resources [Office of Institutional Equity - Home \(ucf.edu\)](https://ucf.edu/institutional-equity)
    - OIE approval is required prior to search moving forward
- Hiring Manager may implement the advertising process or delegate to the search chair or search assistant
- Highly encourage that posting take place after the initial search committee charge meeting when possible

# STEP 4: THE RECRUITMENT PLAN

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## Degree Requirements:

- Hiring managers willing to screen candidates whose degrees are not complete should indicate criteria that the committee can measure during screening.
  - As an example, **“degree expected by August 20\_” may be published in the posting.** If degree candidates who will be qualified by the date of hire are acceptable in the candidate pool, the posting must reflect that.
- If Ph.D. candidates are acceptable in the candidate pool, OIE strongly encourages posting “terminal degree required by time of hire” or “ABDs considered.”
- **It should be noted that applicants must meet the minimum qualifications as outlined in the job posting at the time of application, unless the job posting includes language that states otherwise (as described above). Applicants who do not meet the posted minimum qualifications at the time of application may not be considered for the position.**

# STEP 4: THE RECRUITMENT PLAN

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## Posting Timeframe

- **All Education and General (E&G)** faculty positions must be posted for a minimum of two weeks, unless an Exemption from Posting Request Form has been approved by OIE. The hiring manager should establish a closing deadline of **at least two weeks** after the faculty position has been posted on UCF's jobs website ([www.ucf.edu/jobs](http://www.ucf.edu/jobs)).
- **Contracts & Grants (C&G) and Auxiliary (AUX)** faculty positions must be posted for a **minimum of one week**.
- COS prefers to have specific application deadlines based on the recruitment plan rather than “Open Until Filled”

# STEP 4: THE RECRUITMENT PLAN

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## Posting Content

- Minimum and Preferred Requirements: Clear, measurable, performance-based qualifications
  - **Minimum:** qualifications applicants must possess to be considered a “candidate”
    - Applicants may not move forward without these
  - **Preferred:** qualifications that are not required but seen as “good to have”
    - Helps narrow the applicant pool

# STEP 4: THE RECRUITMENT PLAN

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## Inclusive Language and Accessibility

- To meet federal compliance requirements, use the following appropriate equal opportunity and affirmative action language in all postings (UCF EEO Statement):

“The University of Central Florida is an Equal Opportunity/Affirmative Action Employer including Disabled/Vets. Click on [UCF's Equal Opportunity Statement to view the President's Statement.](#)”

The UCF affirmative action plans for qualified individuals with disabilities and protected Veterans are available for inspection in the Office of Institutional Equity, Monday through Friday, from 9:00 a.m. to 5:00 p.m., upon request.

As a Florida public university, UCF makes all application materials and selection procedures available to the public upon request.

The University of Central Florida is proud to be a smoke-free campus and an E-Verify employer.”

# STEP 4: THE RECRUITMENT PLAN

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## Multiple Positions

- Evergreen Requisition (several identical positions)
  - One Search Committee
  - Subsequent “Do Not Post” requisitions for selected candidates to attach to during the reference check stage
  - Reference to the number of positions on all related requisitions
    - *“The Department of XYZ invites applications for four full-time, nine-month, non-tenure earning lecturer positions in ...”*

# STEP 5: SEARCH COMMITTEE MEETINGS

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## Charge Committee Meeting & Subsequent Meeting Notices

- In compliance with Florida Statutes, Chapter 286, the “Open Meetings Law,” search committee meetings are open to the public and notices of the meetings must be prepared in advance
- Notice templates can be found on the Human Resources website [Search Notice.pdf \(ucf.edu\)](#).
- Once the meeting notice is prepared, a Workday Help case will be sent to HR Talent Acquisition by the HRBC contact requesting that the meeting notice be posted on the University calendar
  - **Must be submitted a minimum of 48 hours before the meeting takes place**
  - If utilizing a virtual platform, utilize Zoom as it provides a publicly accessible link for external attendees.

# STEP 5: SEARCH COMMITTEE MEETINGS

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## Charge Meeting

- Hiring Manager describes the essential functions, as well as minimum & preferred qualifications
- Anticipated timeframe for the search
- Requested work product
  - List of acceptable candidates or
  - List of all interviewees including their strengths and areas of growth
  - **No numerical rankings or scores of candidates should be provided**



# STEP 5: SEARCH COMMITTEE MEETINGS

## Meeting Minutes

- **Must be prepared for all search committee meetings with a corresponding notice**
  - [SearchCommitteeMeetingMinutes-InitialCharge-Template.pdf \(ucf.edu\)](#)
  - [SearchCommitteeMeetingMinutes-Search-Template.pdf \(ucf.edu\)](#)
  - [SearchCommitteeMeetingMinutes-FinalMeeting-Template.pdf \(ucf.edu\)](#)
- Meeting Minutes include:

Meeting date	Screening Criteria for Each Round
Attendees	Names Of Candidate Meeting Criteria for Each Round
Decision Points of the Committee	Conflict of Interest Reviewed
Agreed Upon Quorum	Right of Inclusion Exercised

# STEP 5: SEARCH COMMITTEE MEETINGS

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## Procedural Compliance

- Should be face-to-face or virtual (No video or audio recordings)
- All candidate discussion must take place during committee meetings and not via email (or any other electronic medium)
- No discussions with individuals outside the search committee or with those not part of the selection process
- Florida Statutes, Chapter 119, the “Public Records Law,” all search-related records are classified as public and are subject to inspections under Florida’s public records laws by request unless a specific exemption in the law applies.

# STEP 5: SEARCH COMMITTEE MEETINGS

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## Conflict of Interest

Recusal required if:

- Familial or intimate relationship with candidate
- Shared financial interest or endeavor
- Officially recognized supervisory relationship, including mentor-mentee
  - Former Graduate/Postdoc advisor (recently, within last 4 years)

# STEP 5: SEARCH COMMITTEE MEETINGS

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## Conflict of Interest

Disclosure required if:

- Substantial collaborator on creative/scholarly work or grant applications in past 4 years
- Aware of any prejudice, pro or contra, that would impair judgment
  - Close, personal friend
- Belief that recusal is necessary to avoid the appearance of a conflict of interest

**All conflicts of interest and their resolution must be documented in meeting minutes**

# STEP 6: SCREENING PROCESS

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## Applicant Pool Representation

- Variety of Resources for a Broad Array of Qualified Candidates
  - Supports Affirmative Action Plan (AAP) & EEOC laws
  - Contact OIE if the applicant pool does not include AAP representation
    - Search will proceed with good faith efforts

# STEP 6: SCREENING PROCESS

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## Mitigating Impact of Stereotyping

- Initial Review of Applications
  - Define how candidates satisfy minimum and preferred qualifications as a committee
  - Each committee member reviews application material of all candidates
  - Establish evaluation rubric or score sheet
- Interviewing Candidates
  - Structured and consistent interviews with questions aligned to job role
  - [AcceptableUnacceptableQuestions.pdf \(ucf.edu\)](#)

# STEP 6: SCREENING PROCESS

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## Guidelines for Screening Candidates

- Impartial & equitable, based solely on qualifications noted in the job posting and the documented information in the application materials
- Evaluation Rubric using preferences and other screening techniques at round 2 or beyond
- All candidates should be asked the same initial questions, with follow-up questions to clarify experience or qualifications
- Interview methods should be consistent for each candidate

# STEP 6: SCREENING PROCESS

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## Screening Rounds

- Round One Actions:
  - Screen for minimum qualifications
  - Evaluate AAP placement goals (consult with OIE as needed)
  - Candidates not meeting minimum qualifications will remain in Screen-Round 1-Did not meet minimum disposition in Workday



# STEP 6: SCREENING PROCESS

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## Screening Rounds

- Round Two Actions:
  - Identify candidate who demonstrate some or all of the preferred qualifications
  - Prepare Candidate Pool Evaluation Form and Submit to OIE for approval
  - When candidate only meets some of the preferred qualifications, select the following in Workday
    - Screen or Assessment – Round 2 – Minimum Qualifications Not Hired – Not Interviewed; or
    - Screen or Assessment – Round 3 – Meet Preferred Qualifications Not Hired – Not Interviewed

# STEP 6: SCREENING PROCESS

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## Screening Rounds

- Subsequent Rounds
  - Results of interviews and review of application materials can be categorized to begin
    - Strong, Moderate, Weak
    - Refined criteria should not result in applying changed, unadvertised criteria
    - Finalist round must contain a minimum of 3 candidates
      - OIE approval required to waive this requirement
    - **Screen all candidates and record the results of votes on all**

# STEP 6: SCREENING PROCESS

[CandidatePoolEvaluation.pdf \(ucf.edu\)](#)

- Absentee Voting
- Confidential Materials
- Degree Requirements
- Experience Requirements
- Incomplete Applications

**UCF** Faculty Search & Screening Process

**Candidate Pool Evaluation Form**

Date: \_\_\_\_\_

Position Name & Job Req. Number: \_\_\_\_\_

College or Department Name: \_\_\_\_\_

Search Chair & Hire Official Name: \_\_\_\_\_

Search Assistant Name(s): \_\_\_\_\_

### Screening Evaluation Criteria

*(After minimum and preferred round screening)*

List Candidate(s) Meeting Minimum Qualifications	Posted Minimum Qualifications
List Candidate(s) Meeting Preferred Qualifications	Posted Preferred Qualifications
List Candidate(s) Meeting Add'l Preferred Qualifications	Add'l Preferred Qualifications
List the Candidate(s) Recommended for Preliminary Interview(s):	

*\*If more than three screening rounds, submit criteria and candidates advanced for additional rounds on a separate sheet. Submit to OIE@UCF.edu\**

# STEP 6: SCREENING PROCESS

[CandidatePoolEvaluation.pdf \(ucf.edu\)](#)

- Right of Inclusion (Motion to Reconsider)
- Use of Rating or Point Values
- Use of Subcommittees
- Use of Tests/Assessments
- Withdrawal of Candidacy – Must be online
- Open Postings and Candidates

**UCF** Faculty Search & Screening Process

**Candidate Pool Evaluation Form**

Date: \_\_\_\_\_

Position Name & Job Req. Number: \_\_\_\_\_

College or Department Name: \_\_\_\_\_

Search Chair & Hire Official Name: \_\_\_\_\_

Search Assistant Name(s): \_\_\_\_\_

### Screening Evaluation Criteria

*(After minimum and preferred round screening)*

List Candidate(s) Meeting Minimum Qualifications	Posted Minimum Qualifications
List Candidate(s) Meeting Preferred Qualifications	Posted Preferred Qualifications
List Candidate(s) Meeting Add'l Preferred Qualifications	Add'l Preferred Qualifications
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*\*If more than three screening rounds, submit criteria and candidates advanced for additional rounds on a separate sheet. Submit to OIE@UCF.edu\**

# STEP 6: SCREENING PROCESS

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## Interviewing

- Preliminary interviews may be in-person or virtually
- Interviewing candidates prior to the job posting closing is allowed
  - Close requisition before finalists identified
- Committee member and other faculty may be asked to interview final candidates
  - If the candidate is only conducting a presentation, this **does not** have to publicly noticed
  - Use Qualtrics survey for feedback

# STEP 6: SCREENING PROCESS

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## Preparing for Interview

- Provide Qualtrics Surveys to attendees of the finalist interviews
- Designate a candidate guide for the day
- Consider accessibility of the physical environment
- Offer to test virtual platforms ahead of time with candidate
- If candidate indicates needing an accommodation, contact OIE
  - [Office of Institutional Equity - Accommodations \(ucf.edu\)](https://ucf.edu/institutional-equity/accmod), [oie@ucr.edu](mailto:oie@ucr.edu), or (407) 823-1336

# STEP 6: SCREENING PROCESS

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## Interviewing FAQs

- Repeat interviews not required within 90 calendar days of interviewing a candidate for a similar position
- Internal candidate and interim appointee interviews should be consistent with external candidates
- Payment of expenses is responsibility of the department
- Include all committee members in the decision to move a finalist forward to the hiring manager
  - Format should be “names, strengths and weaknesses” or “names of acceptable candidates in alphabetical order”
  - Minutes recording the action should be included in the search file
- Faculty offers or guarantee of position may not be extended prior to issuance of an Employment Agreement by FE-PA

# STEP 6: SCREENING PROCESS

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## Reference Checks

- Required for external and internal searches, including regular and visiting line positions
- Focus on getting an understanding of the success of the candidate in the posted position and validate the CV
- Ask candidate to clarify any inconsistencies with reference results and take steps to obtain accurate information
- Refrain from using personal websites or social media sites as points of reference
- Minimum of 3 reference checks with two phone references rather than written
  - Letters of recommendation shall not exceed more than one year from conditional offer
- [Faculty-Employment-Reference-Form-1.pdf \(ucf.edu\)](#)



## STEP 6: SCREENING PROCESS

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### Recommendation to Hiring Manager

- May be written comment sheets or discussion with the hiring manager
  - Written records must be preserved
  - Hiring manager is responsible for preservation of all search-related documents
  - Candidates **should not be numerically ranked or scored** when provided to hiring manager

## STEP 7: AFTER FINALISTS' INTERVIEWS & PRE-OFFER TO CANDIDATE

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- The hiring manager should select a candidate based on the following:
  - Finalist's qualifications
  - Search committee recommendations
  - Feedback from all interviewers
- All documentation should be provided to your HRBC contact for final submission to OIE for approval and disposition within Workday
  - [OIE Search Documentation Checklist \(ucf.edu\)](#)

# STEP 7: AFTER FINALISTS' INTERVIEWS & PRE-OFFER TO CANDIDATE

## Foreign Influence Screening Requirements

Before offering a Research Position to certain individuals, Florida Statute 1010.35 requires most Florida state-sponsored institutions, including the University of Central Florida, to review and screen certain information. These requirements apply to:

1. All foreign nationals, defined as Non-U.S. Citizen/Non-U.S. Permanent Residents.
  2. U.S. Citizens or Permanent Residents:
    1. Who have had one year or more of higher education, employment, or training in China, Cuba, Iran, North Korea, Russia, Syria, or Venezuela; or
    2. Who have an affiliation (i.e., board membership, company ownership, honorary title, etc.) with an institution or program in China, Cuba, Iran, North Korea, Russia, Syria, or Venezuela.
- These requirements do not apply to U.S. Citizens or U.S. Permanent residents if the employment or training was/is through an agency of the U.S. Government. The information outlined on this website is meant to assist the UCF community in meeting these requirements.

**THE LETTER OF INTENT IS THE ONLY LETTER THAT CAN BE USED DURING THIS SCREENING PROCESS – THE THREE FINALISTS WILL BE SUBJECT TO THIS SCREENING**

## STEP 6: OFFER

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- When approved to proceed by HRBC contact, a Recommendation to Hire Letter may be issued
- Additionally, kNEXT will complete a criminal background check on all finalists
- UCF only considers an Employment Agreement as the authorized offer

Refer to the [SearchandScreeningGuidelines.pdf \(ucf.edu\)](#) for additional guidance

## FACULTY HIRING CONSIDERATIONS

SECURING SUPPORTING DOCUMENTS & RETENTION OF PUBLIC RECORDS

SEARCH PROCESS LOGISTICS

COMMUNICATION WITH CANDIDATES

EXEMPTION FROM POSTING & SEARCH REQUIREMENTS

FACULTY INTERNAL SEARCHES

# SECURING SUPPORTING DOCUMENTS & RETENTION OF PUBLIC RECORDS

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- The Hiring Manager is responsible for retention of all public records
  - May be delegated to the search chair or search assistant during the search
    - Must submit all documentation to the HRBC contact on a regular basis throughout the search process
  - Faculty search files include recommendations and documentation of final selection procedures
- The University must retain all search materials for four years for potential EEO or AAP compliance reviews

# SEARCH PROCESS LOGISTICS

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## ACCEPTABLE COMMUNICATION STRATEGIES

- Email committee scheduling
- Email “attachments” of minutes circulated for committee review
- Conference calls or video conferencing arrangements
  - Virtual participants must be able to fully participate
  - May not be conducted for campus interviews or exchange of reference-call results
- Virtual “screening interviews” of candidates by committee
  - Must be applied consistently to each candidate

# COMMUNICATION WITH CANDIDATES

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## CANDIDATES REQUESTING SPECIFIC RESPONSES

- Committee members, search assistants and hiring managers are not required to provide verbal details or actions
- Minutes are public documents and convey accurate descriptions of actions taken
  - [Public Records Requests | University of Central Florida - Orlando, FL \(ucf.edu\)](#)
- Workday only notifies candidates of disposition at the screen and assessment stages when declined
  - Refer inquiries to your HRBC contact



# EXEMPTION FROM POSTING & SEARCH REQUIREMENTS

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- Require approval of Hiring Manager's Supervisor, as well as the Dean
- [RequestforExemptionfromPostingForm.pdf \(ucf.edu\)](#) Exemption Circumstances:
  1. Interim appointment or visiting appointment for no longer than one year
  2. Principal Investigator named in a grant
  3. OIE approved internal search
  4. Participants of university-approved professional development program (i.e., Leadership Empowerment Program)
  5. UCF Faculty Recruitment Program
  6. OIE approval of a candidate that is in the best interest of the University to hire

# FACULTY INTERNAL SEARCHES

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- Permitted for faculty positions when no vacant position exists to support a new full-time set of responsibilities
  - For example: A full-time Associate Dean's responsibilities filled by a member of the COS faculty
- [InternalSearch.pdf \(ucf.edu\)](#) Guidelines
- OIE exemption from posting required
- Search Committees are required



# Questions

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