

## FACULTY SEARCH ASSISTANT CHECKLIST

Pre-Offer	Noted OIE Checkpoints
<ul style="list-style-type: none"> <li><input type="checkbox"/> Complete mandatory search training (<a href="#">Click here to access training</a>)</li> <li><input type="checkbox"/> Meet with the hiring manager to review position vacancy, recruitment plan, and search assistant expectations, as well as discuss whether references will be checked manually by the department or electronically via Workday.</li> <li><input type="checkbox"/> Secure search committee membership list and preliminary recruitment plan from hiring manager.</li> <li><input type="checkbox"/> Contact HRBC to confirm if mandatory search committee training has been completed by the search committee members.</li> <li><input type="checkbox"/> Collaborate with the search chair and the hiring manager to schedule search charge committee meeting.</li> <li><input type="checkbox"/> Ensure that Search Committee Meeting Notices are prepared and submitted to Human Resources/Talent Acquisition at least 48 hours PRIOR to ALL scheduled meeting dates (in compliance with Chapter 286.011 Florida Statutes). Candidate-interview-only meetings with the search committee are not required to be noticed; candidate interview-only meetings where non-committee members will attend must be publicly noticed. In addition, committee meetings to assess the candidates following the interviews must be noticed.</li> <li><input type="checkbox"/> Review <a href="#">UCF OIE Search &amp; Screening Guidelines</a> and other search-related resources found on the OIE website under the Employment Equity tab.</li> </ul>	
DURING SEARCH	
<ul style="list-style-type: none"> <li><input type="checkbox"/> OIE recommends that the search assistant attend the initial and any subsequent search committee meetings.</li> <li><input type="checkbox"/> Provide administrative support to the search committee.</li> <li><input type="checkbox"/> Serve as the custodian of records during the search process. Assist the search committee in creating a meeting schedule based on search timeframes.</li> <li><input type="checkbox"/> Document committee member attendance.</li> <li><input type="checkbox"/> Document the hiring manager's charge and candidate recommendation preferences.</li> <li><input type="checkbox"/> Document the agreed upon minimum and preferred qualifications and tools for each screening round; criteria must be objective, measurable, and performance based.</li> <li><input type="checkbox"/> Document the committee's recommendations for additional recruitment strategies.</li> <li><input type="checkbox"/> Collaborate with the HRBC to create the job requisition in Workday. Please ensure that the <a href="#">Recruitment Plan form</a> (inclusive of search committee membership) is uploaded to job requisition before submitting it for approvals.</li> <li><input type="checkbox"/> Document the discussion of how 'conflicts of interests', as well as 'the right of inclusion' (also known as the motion to reconsider) are used during the search.</li> </ul>	<p style="text-align: center;">Recruitment Plan (submitted in Workday with job requisition) requires OIE approval.</p>

<ul style="list-style-type: none"> <li>□ Document the committee's <b>decision on a quorum</b>.</li> <li>□ Record any special requirements of the search. When appropriate, remind the search committee of the importance of treating all candidates the same throughout the search process, from screening applicants using the same criteria to conducting interviews using the same questions and in the same format.</li> <li>□ Review regulations governing record-keeping associated with a search; specifically, the <a href="#">Florida Sunshine Law and the Public Records Law</a>.</li> <li>□ <b>NOTE:</b> The search assistant is not ex-officio and cannot participate as a voting member of the committee (unless there are extenuating circumstances and with OIE pre-approval). The search assistant is not involved in the substantive review of applicants, nor do they participate in committee deliberations.</li> <li>□ Provide administrative support for subsequent search committee meetings. Review the following:</li> <li>□ <u>Recruitment Plan Implementation</u> <ul style="list-style-type: none"> <li>• <b>Include job ads and announcements via UCF processes</b> (in collaboration with HR-Talent Acquisition and/or Faculty Excellence-Personnel Administration).</li> <li>• <b>Include job ads and announcements via non-UCF processes</b> (platforms that are position/discipline-specific or that may attract a broadly represented applicant pool, especially where there is an affirmative action plan (AAP) goal for the vacant position. Contact the HRBC to determine if there is an AAP goal).</li> </ul> </li> </ul> <p><b><u>Candidate Screening Process:</u></b></p> <ul style="list-style-type: none"> <li>□ Document evaluation of candidates at each step in the process including the names of those who have advanced at each screening round and who have been interviewed. Documentation in the search minutes must reflect the stages of progression in each round. (For <i>meeting minutes templates</i> see the <a href="#">OIE website</a>).</li> <li>□ Review minimally qualified applicant pool for broad representation after search committee's Round One review for minimum qualifications. If the minimally qualified pool lacks broad representation, consult with OIE regarding options, including the applicability of waiver.</li> <li>□ Ensure that the committee does not consider a candidate that does not meet the posted minimum qualifications.</li> </ul> <p><i><b>Please Note:</b> Minimum qualifications cannot be changed during the screening process: candidates must be screened consistent with the advertised qualifications in the job posting; if minimum qualifications need to be changed, you likely will be required to fail the search and re-post.</i></p>	<p><u>If the applicant pool lacks broad representation, consult with OIE regarding applicability of waiver.</u></p>
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- ☐ Coordinate with the search chair to determine applicable disposition statuses in Workday
- ☐ After search committee screens all applicants for minimum and preferred qualifications, but before preliminary interviews are initiated, prepare the [Candidate Pool Evaluation Form](#), which must be forwarded to OIE at [OIE@ucf.edu](mailto:OIE@ucf.edu). This form should reflect candidate progression through the screening process. The minimum and preferred qualifications on the Candidate Pool Evaluation form must be identical to the criteria listed in the job posting.

Preliminary interviews may not be scheduled without OIE's approval of Candidate Pool Evaluation Form

**Candidate Interview Process:**

- ☐ Manage the status of applicants in the Workday.
- ☐ Schedule interviews and communicate information to appropriate parties.
- ☐ Schedule meetings and on campus interviews and/or presentations and communicate information to appropriate parties.
- ☐ Make travel/lodging arrangements.
- ☐ After finalists' interviews are complete, upload the search/offer documents to the selected candidate's Workday profile for OIE review and approval. See the [Faculty Offer Documentation Checklist](#) for a complete list of documents that must be uploaded to the selected candidate's Workday profile.
- ☐ Ensure reference checks are completed for finalist(s). Three reference checks are required for both internal and external hires. There are two options for meeting reference requirements:

Three References Required	Reference 1	Reference 2	Reference 3
Option 1	Phone or electronically via Workday	Phone or electronically via Workday	Phone or electronically via Workday
Option 2	Phone or electronically via Workday	Phone or electronically via Workday	Recommendation Letter (Date of the letter should not exceed more than a year from when a conditional offer is extended)

**NOTE:** For option 1 or 2, at least two of the three required references must be conducted by phone or electronically via Workday.

- ☐ If selected candidate is being considered for a tenured position or a position in which tenure credit is being offered, work with the hiring manager (or designee) to ensure that a preliminary review and approval by Faculty Excellence is conducted.

**Throughout the search, work with the search chair to:**

- ❑ Take and prepare committee meeting minutes (See [Search Committee Meeting Minutes Template](#)). *Please ensure that the names of the candidates that have advanced during each screening round are included in the search minutes. Finally, ensure that the names of the final candidates the search committee recommends as acceptable for hire are included in the search minutes.*
- ❑ Document the resolution of any 'conflict of interest' brought forward by a committee member. For example, if a search committee member recuses themselves related to a specific candidate, this should be documented in the meeting minutes each time there is committee action related to the specific candidate. See [UCF OIE Search & Screening Guidelines for more on Conflict of Interest](#).
- ❑ Document occasions when 'right of inclusion' is exercised. See [UCF OIE Search & Screening Guidelines for more on Right of Inclusion](#).
- ❑ Collect records of all committee meetings, including selection criteria, decision making, voting, advertisements, search notices, etc.
- ❑ Review search committee meeting minutes and other search-related documentation for completeness and accuracy.
- ❑ Maintain search records to comply with federal or state record-keeping laws; specifically, the Florida Statutes, Chapter 119, Public Records Law.
- ❑ Maintain confidentiality throughout the entire search process.

**OFFER**

**Prior to extending an offer, work with the HRBC to confirm and finalize the following:**

- ❑ Upload documents required for OIE compliance audit of offer to the selected candidate's Workday profile (see [Faculty Offer Documentation Checklist](#) – OIE Review on OIE website). The formal offer cannot be extended until OIE has approved the offer in Workday.
- ❑ Confirm with the Human Resources Business Center (HRBC) that the background check process has been successfully completed for the candidate.
- ❑ Confirm whether the candidate was required to go through the UCF Foreign Influence Screening Process. If the candidate was required to go through the UCF Foreign Influence Screening Process, confirm that the candidate was approved by the Office of International Collaboration and Export Control (OICEC).
- ❑ **Please note** that if the candidate has a current relative, or a relative or person living in the same household (including dating anyone employed at the university), an [Employment of Relatives form](#) must also be submitted and reviewed prior to an offer being extended. This can be done at the same time as the preliminary review and approval of hire with tenure or tenure credit. Coordinate with search chair on this matter.

POST-OFFER	
<p><b><u>After the search, work with search chair to:</u></b></p> <ul style="list-style-type: none"> <li>□ Ensure that all applicants have been appropriately dispositioned in Workday.</li> <li>□ Maintain all search records. As a federal contractor, UCF is subject to compliance audits conducted by the OFCCP. As a Florida public employer, we must comply with public records laws.</li> <li>□ <b>NOTE:</b> The onboarding stage now begins for the candidate. This includes completion of I-9 and other legally required forms, university and/or college-specific onboarding documentation (for example, tenure and teaching credentials), etc. After the offer has been accepted, work with the designated HR SET role (or hiring official) to provide the candidate with instructions on how to submit official transcripts (and foreign equivalency evaluations, if applicable) to the designated HR Business Center representative.</li> </ul> <p><b><u>Reminders about References:</u></b></p> <p>The hiring department chooses the collection method for references when creating the job requisition (references may be checked manually by the department or electronically checked via Workday). Regardless of the chosen collection method, when the department moves the candidate to 'references' in Workday, the system will email the candidate to request reference information (this function cannot be disabled). If the hiring department chose to manually collect the references when creating the job requisition, Workday only collects the reference information. However, if the department chose to electronically collect the references when creating the job requisition, Workday will initiate the reference check process. <a href="#">See the Workday Reference Check Job Aid for details.</a></p>	<p><b><u>A formal offer may not be extended without OIE approval of search process</u></b></p>

