

Selection Process Documentation Checklist

Retention Summary (All Documents Maintained for 3 Years from date of Hire¹):

- Position Description
- All advertisements and postings
- Record of recruitment efforts including but not limited to those intended to broaden the qualified applicant pool
- Letters of support, resumes, CVs, or other application materials not submitted through online system
- Record of initial screening criteria and their consistent application (including Virginia Veteran Preference)
- Interview experiences, questions, and notes or other feedback
- Summary evaluations
- Summary records of committee deliberations including a description of who was present, what was discussed, and the date it occurred (**Note:** discussions over a series of emails should be kept as part of the file)

Detailed Actions (Responsible parties will vary by process but include Hiring Official, Committee, Support):

- Review, update, document the position description (record information in system of record, as appropriate)
 - Job analysis should define the purpose of the role and validate the minimum and preferred requirements for the position. Physical and mental requirements should also be considered.
- Create and document the recruitment plan
 - What sources were used? Why were they selected? Are they specific to the profession/discipline?
 - Keep copies of advertisements and/or receipts of payments; keep emails distributed to listservs, lists of schools or chairs contacted, conferences attended where the position was discussed, social media, etc.
 - If posted online, visit the site to confirm placement (Take a screenshot and save as part of the hiring file.)
- All hiring officials, search chairs, and committee members must have taken required training
 - If the committee composition changes during the process, make sure this and the reason is noted.
- Create a screening criteria worksheet from job requirements and discuss interpretation of criteria where potentially ambiguous or qualitative prior to reviewing applications
- Record who screens the applications, when they were screened, and how the applicant fared (can be narrative of process and summary notes on each applicant)
 - Did they meet minimum qualifications? Did they meet preferred qualifications?
 - Will they be invited for an interview?
 - How was it decided who would be interviewed?
- Are there any veterans in the applicant pool? Were they given the appropriate preference?
- Communicate applicant statuses with HR or other support representatives on a regular basis throughout the screening process
 - Where possible make sure applicants are notified of their status through use of system emails or tailored communications from the department. If emails/letters are sent outside of the system, the content of the letter, the distribution list, and the date should be recorded.
- Before any interviews are held, create consistent interview questions or general lines of inquiry that will be discussed with all candidates
 - These should be recorded and kept as part of the hiring file
- Create consistent (not necessarily identical based on legitimate business reasons) interview day agendas and keep the documentation as part of the hiring file
- Keep records of all hiring official/chair/committee contact with applicants and candidates
- Take notes during interviews and keep as part of the hiring file (professional tone and only job-related)
- Record feedback from stakeholders not represented on the committee (Name, role, date met with candidate) and keep as part of the hiring file
- Document reference checks (Who was contacted, who contacted them, when were they contacted, what questions were asked, what were the responses, etc.)
- Document the salary negotiation process. Who made decisions? Explain why salaries/bonuses/other incentives were deemed appropriate for the hire.

¹ See Record Schedule/Series Number: 103-012185 at <https://recordsmanagement.virginia.edu/retention-schedules>.