

Intake Meeting Form



Position Information

New Replacement

Prior Incumbent: _____

Why is this position needed (and when applicable), why did the prior incumbent leave:

Position Responsibilities (This will provide a clear vision for the job description)

What are the primary responsibilities for this role?

What are the main teams this position will work with? What qualities are you looking for in a candidate that would make them successful in collaborating with these teams? (Consider the information you gathered in advance regarding potential skills gaps that you may be looking to fill.)

How will you know if this position is going to be successful?

Principles duties (with percentages):

Checkpoint:

- Is the language used in the job summary and the position description clear and understood to a larger audience (i.e., in plain language)?
- Do you avoid using UW-Madison jargon/acronyms? Do you refer to specific UW-Madison systems that only speak to applicants who have work experience at UW-Madison?
- Have you considered flexible working hours and/or the option to work remotely to attract a larger applicant pool?





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Requirements (This information will also determine screening criteria)

Is there someone at the UW who is an example of a successful candidate? If so, who is that and what about them makes them successful?

What technical and people skills should the candidate bring to this role, day one? What types of projects, experiences, or behaviors would be evidence of this knowledge and skills?

What skills and capabilities are preferred, but not necessary? What would you look for as evidence of these skills?

What knowledge and skills can be learned on the job?

Are you looking for a specific number of years of experience in different areas of expertise? Why?

Will this position supervise other employees? Student workers?

KSAs	Absolutely needed on day one	Able to learn on the job	Priority or weight	Required or Preferred	Evidence (criteria)

Checkpoint:

- **Who might you exclude or include with these requirements? How would this answer impact your eventual recruitment strategy?**
- **Is there flexibility in the requirements if candidates have relevant experience?**
- **Are there any immigration implications (i.e., are there certain requirements that would preclude candidates from being able to apply for a work permit, and if so, is that ok?)**





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Education

Is there a specific certification needed for this role? If yes, please describe the certification and why it is necessary.

Is a graduate degree required for success in this role? If so, please describe the type of degree and why it is necessary.

Is a bachelor's degree in a specific discipline required for success in this role? If so, please describe the degree and why it is necessary.

Education:

Proposed Screening Criteria (as it relates knowledge, skills, experience, and education):

Checkpoint:

- **Are the official title and business title still applicable to this position? Adjust accordingly after reviewing the responsibilities and requirements of this role.**
- **Is it necessary to require a certain level of education for this position as opposed to experience in this area?**

Department/Culture (this information will inform your job summary and adverting summary)

Describe the makeup of your department/work unit. What working/social styles are dominant in your unit? What are the gap areas? What/who is missing? How would a new perspective add to your unit's success?

What relationships and networks have you developed that you can reach out to recruit for this role? What groups and networks may be missing?





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What organizational culture do you and your department wish to embody? What characteristics/qualities would contribute to this culture?

Who will/needs to be involved in onboarding this new employee? (For consistent applicant experience from hiring through onboarding)

Professional Development (this information may inform your job summary or adverting summary)

Describe the career path for this position. What does growth/promotion look like for this role?

What professional development support/funding will be available for this role? Is there a budget for conference/travel/education?

Job Summary:

Advertising summary for the TREMS posting:

Checkpoint:

- **Is the language used in the job summary and the advertising summary clear and understood to a larger audience (i.e., in plain language)?**
- **Who might you exclude or include in the language you use in these summaries?**

Search/Advertising Strategy (this information will inform your recruitment and search process as well as your advertising strategy)

What have you learned from similar/past recruitments? What challenges did you experience and why? What went well and what did not? Who was not involved that should have been?





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What are your strategies to address these challenges? What will you do differently?

What would the ideal candidate pool look like? How will you achieve this? What are strategies to hold yourselves and the search and screen accountable to your goals?

Does your unit already have a talent pipeline that they can draw upon to help achieve the ideal candidate pool?

What search and screen model are you planning to use to evaluate candidates?

- Single hiring committee (with Hiring Manager) makes decisions after a thorough evaluation process
- Multiple committees screen applicants through the process and make recommendations to Hiring Manager

Why does your selected search/search and screen model best meet your recruitment needs?

Who will be on your search/search and screen committee? What skillset/knowledge are they bringing? How will they help achieve your goal to bring in a diversity of viewpoints and experiences?

Are you open to inviting members from outside of your work unit/division to serve on the committee?

What does your interview process look like? Will you need multiple interview phases? Presentations by candidates? Why?

Advertising Strategy (where you will advertise, what kind of outreach will you need?):





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Search/Search and Screen Committee Members:

Recruitment Process/Timelines/Roles

Recruitment Step	When	Who
E.g., Reach out to S&S members	Feb. 6	Hiring Chair

Checkpoint:

- Who might you exclude or include in your recruitment process?
- How might bias show up throughout the review/interview process? How will you mitigate bias throughout this process?
- Are you mindful of candidates who do not have access to the technology needed for phone/video interviews or access to appropriate transportation for in-person/on-campus interviews?
- Are you allowing ample time to develop interview questions for every phase of the interview process (in partnership with the search and screen committee) that align with the division’s values and the criteria for the position?

Position Logistics

Official Title: _____

Business Title: _____

Department: _____ UDDS: _____

Work Location: _____

Remote Work Possible: Yes No Partial Remote or Fully Remote: _____

Position Employment Type: University Staff Academic Staff Faculty Limited Temporary

Position Continuity: Ongoing/Renewable Fixed Terminal

Desired Start Date: _____ End Date (if applicable): _____

FTE: _____ Work Schedule: _____

Supervisor: _____

Minimum Salary to Post on Web: _____ Post Maximum Salary: Yes No





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Maximum Salary (If not posted, for negotiation): _____

Funding: _____

International Sponsorship Available: Yes No

Relocation Funding Available: Yes No

Hiring/Referral Bonus Funding Available: Yes No

Application Materials

Cover Letter/Statement of Interest

Resume/CV

Work History

Letters of Reference Uploaded

Use Reference Form in Application

Supplemental Materials

Other(s): _____

What information must the cover letter/statement of interest contain?

