**UC Recruit Search Plan Form-Fillable Worksheet**

To be used during search planning and preparation. **For multi-level searches, use the Multi-Level Search Worksheet.**

Plans are to be processed online in UC Recruit.

*The UC Recruit system is updated frequently and recent changes may not be reflected here.* ***Last updated April 23, 2021***

**Initiate a Search Plan in UC Recruit by following these steps:**

* Log in using any web browser, navigate to <https://recruit.ap.ucsb.edu>
* Select **UC Santa Barbara Faculty & Administrators**
* Enter your UCSBnetID and UCSBnet Password

*Look for the*  “*badge” throughout search plan creation;*  *means the field will lock down. Hover cursor over badge for details.*

1. ***Create the Basic Recruitment*** – click “Create New Recruitment Plan” under Recruitments module

*Recruitment Name* using the following format: “Job Title – Area of specialization *(if applicable)* – Department”

*e.g. “Assistant Professor in Experimental Condensed Matter, Department of Physics”*

[Enter Recruitment Name: *Job Title (Specialization), Department*]

*Department* [Enter Department]For cross-listed or multiple, contact [help@aait.ucsb.edu](mailto:help@aait.ucsb.edu)

*Accept Online Applicants (recommended)*

*Diversity Survey Only (not recommended)*

Next,click **Create Recruitment Plan.** You have now initiated a saved draft for your Search Plan and created a unique search identifier, the “JPF” number.

Look for the green “Ad” badges

These indicate which fields will be pulled into the final Apply Page text and PDF advertisement download

1. **Details Tab**

**General information**

*Recruitment Name* - automatically populated from step A

*Job Number* - automatically populated from step A

*Home Department* - automatically populated from step A

**Search Tracking**

*Salary Control #* – FTE identifier **(Senate searches only)**– e.g. ANTH21 If more than one FTE per recruitment, please consult AP

[Enter FTE identifier]

*Search Breadth* – general search in a department regardless of exact field of study vs targeted/specialized search

*Open*  *Specialized or targeted*  *Don’t know*

*Initial Search Allocation –* is position newly allocated or is it being re-listed from a past failed search?

*Newly Allocated*  *Relisted*  *Don’t know*

*Approved Search Area* – area for which FTE was approved **(Senate searches only)**

[Enter Approved Search Area]

**Contact Information:**

*Contact Information:*

*Address:* [Enter mailing address that applicants may use]

*(departments must provide a physical mailing address to accommodate applicants with technical difficulties or disabilities)*

*Faculty and Staff Contact* (not visible to applicants):

*Name* [Contact Name] *Email* [Email]

*Public Contact for Applicants and References:*

*Name* [Contact Name] *Email* [Email]

*Help Contact* (This will be pulled into the Apply Page):

*Email* [Help Contact Email]

*Links (Optional)* – enter label and URLs *(e.g. dept webpage, https://www.dept.ucsb.edu/)*

[Label] [Enter Information link URL]

[Label] [Enter Information link URL]

**Dates:**

*Application Submission Dates* – choose Initial Review Date (recommended) *or* Open/Close/Final

*IRD: Open Date* [Select Open Date]

*Initial Review Date* [Select Initial Review Date]

*Final Date* [Select Final Date]

*Initial Review date should be set at least 14 days from open date for Non-Senate Searches, 30 days min for Senate Searches; Review Dates cannot be changed once set, but Additional Review Dates may be added once IRD passes and prior to Final Date. Recommended for most searches.*

***\*\*Do not mark applicants as Meets Basic Qualifications or otherwise evaluate them if they apply outside of a Review Date window\*\****

*O/C/F: Open Date* [Select Open Date]

*Close Date* [Select Close Date]

*Final Date* [Select Final Date]

*Close Date is the last date an applicant can start applying; dates cannot be modified once Search Plan is published. Setting Close and Final dates the same may avoid applicant confusion. Mostly used in Non-Senate searches.*

1. **Position Tab**

**Position details**

*Job Location –* optional [­­­­­location]

*Salary Range –* leave blank; determined later

*Anticipated start–* req’d for senate; optional for non-senate [­­­­­start date]

*Position duration –* optional [­­­­­duration]

*Percent time –* optional [­­­­­percent time]

*Rank/Step –* leave blank; determined later

**Title Information**

*Title codes* – enter all that apply – *e.g pooled lecturer searches may include title codes 1630, 1632, and summer 1550; pooled research searches may include Exempt and/or Non-Exempt; Academic Coordinator title codes should be fiscal or AY, etc.*

***Do not select “Make this recruitment multi-level” – use Multi-Level Worksheet if needed***

[Enter one or more title codes]

*Position title – optional*

[working title]

1. **Description Tab –** note that this no longer contains all ad elements because of Billboard functionality

**Position description**

[Enter Description including anything not detailed by green ad badges and campus diversity statement. No need to enter EEO/AA tagline]

**Standard text –** EEO/AAA tagline; will appear automatically in apply page & advertisement download

1. **Requirements Tab**

*Reference type (select one):*

None

Only Contact Info – indicate how many: # Required # Optional

Letters of Reference – indicate how many: # Required # Optional

*Departments are encouraged to carefully consider reference letters settings, especially for tenure-track or tenured Senate faculty searches; consult with AAIT or AP prior to plan submission as appropriate.*

*Reference Process Explanation* – required/applicant-facing

[details for applicants about reference collection and usage]

*Show references to (select one):*

All reviewers *(default)* Only facultyOnly Asst/Assoc/FullOnly Assoc/FullOnly Full

*Required and Optional Documents* – The system automatically generates default applicant documents. These may be edited using the *Edit* button, e.g. *Curriculum Vitae* may be changed to *Resume*. Document slots may be added as needed, or deleted if not appropriate to the position, e.g. Temporary Lecturer searches do not generally need a *Statement of Research*. You may re-order the list so that required items are grouped together for clarity. Departments may also add an optional description to guide applicants in submitting the appropriate materials, e.g. *“*Teaching Evaluations, if available.”

***Note: 50MB limit each slot***

*Curriculum Vitae*: required  optional  delete  edit:[Edit name and/or add description here]

*Cover Letter:* required  optional  delete  edit:[Edit name and/or add description here]

*Statement of Research*: required  optional  delete  edit:[Edit name and/or add description here]

*Statement of Teaching:* required  optional  delete  edit:[Edit name and/or add description here]

*Statement of Contributions to Diversity:*

required  optional  delete  edit:[Edit name and/or add description here]

*Misc/Additional:* required  optional  delete  edit:[Edit name and/or add description here]

*Misc/Additional:* required  optional  delete  edit:[Edit name and/or add description here]

1. **Qualifications Tab**

*Basic Qualifications* (required) should be non-comparative, objective, relevant to the position, and verifiable through application materials alone. They are the minimum threshold for consideration as an applicant, and should be met at the time of application.***Basic Qualifications are used to identify the OFCCP applicant pool.***

For pooled searches and/or searches which include more than one job (title) code, they should be set to the lowest common requirements that an applicant should have at the time of application. Specify whether the applicant should have a degree in hand by time of application, e.g. "Ph.D. in Biology," means that the applicant must have the degree conferred in order to apply for the position. If the department wants to consider applicants who are ABD, it may set Basic Qualifications as " At a minimum, applicants are expected to have completed all requirements for a Ph.D. (or equivalent) in Biology, except the dissertation (or equivalent) at the time of application." If appropriate, Additional Qualifications may be set as "PhD in Biology” (for example) to ensure that the degree is conferred by the appointment date.

[Enter Basic Qualifications]

*Departments are advised to assess Basic Qualifications for Complete applicants after Final date (O/C/F) or after Review Date (IRD) has passed. For IRD searches with many applicants, dept analysts may choose to perform a Basic Qualification initial sort as applications are Completed within a review date window. However, it is essential that departments wait to conduct substantive review of applicants until after Close or Review dates have passed. (Incomplete applicants should not be reviewed at all.)*

*Additional Qualifications* (optional)*–* anything listed here is a requirement of the position and must be met by start date (if none leave blank)

[Enter Additional Qualifications]

*Preferred Qualifications* (optional)are not required but are desirable by the start date of the position (if none leave blank)

[Enter Preferred Qualifications]

1. **Diversity Tab**

Resources to assist with this section are available at <https://eodp.ucsb.edu/equal-opportunity-and-affirmative-action/academic-recruitment-tools>

*Availability Data:* Customize availability pools for each individual recruitment by selecting as many Fields of Study as are appropriate. You may edit fields of study before submitting for approval, if necessary.

*Affirmative Action Goals*

Optional: *Equity Advisor (Senate Titles Only)/Equity Advisor role—*Use the *Equity Advisor role* field to write a description of the role of the listed Equity Advisor in this search. [optional: Enter Equity Advisor role]

1. **Advertisements Tab**

*Planned Search & Recruitment Efforts –* Describe all planned efforts to reach a broad and inclusive applicant pool. Include all advertising outlets and describe specific actions you will take to reach underrepresented minorities, women, protected veterans, and individuals with disabilities. Specifically state what efforts will be made to reach groups that are underutilized according to the Affirmative Action Plan (AAP).

***HERC category:*** UCSB is not a member of HERC; leave blank.

[Enter Planned Search & Recruitment Efforts]

*If advertising through* ***JobElephant****, contact them* ***prior*** *to submitting the Search Plan. After final Search Plan approval, send JobElephant an email to execute the pre-arranged advertising plan.*

*Ad Documents* – Any alternate versions of ads, e.g. short print ads, should be uploaded here.

*Applicant Search Sources –* Enter options for asking how applicants heard about the recruitment, i.e. “Ad Sources” *(do not enter “UC Recruit”)*

[Enter Ad Sources]

1. **Selection Process Tab**

*Selection Criteria* – (required)outlinethe evaluation and selection criteria the committee will use to evaluate the applicants. These should be job-related and consistently applied to applicants

[Enter Selection Criteria]

*Selection Plan* –describe the steps the search committee will implement in order to evaluate the applicants and arrive at the Proposed Candidate(s). The plan should include detailed information about screening and evaluation of applicants, interview procedures, voting procedures (if applicable), etc. For example, if a long shortlist of candidates is to be interviewed via Zoom, describe the plan here.

[Enter Selection Plan]

*Specializations* – (optional)applicants may select specific areas of specialization within a discipline. Search committees will be able to filter applicants by Specializations (if none, leave blank)

Two options:

**List** – applicants may pick as many as they like or they can choose to pick none

**Ranked** – applicants must pick at least one and may pick a secondary and tertiary.

[Enter Specializations, one per line entry, if using]

1. **Committee Tab**

The Core Committee consists of those officially serving as applicant reviewers; these members are also included for reporting purposes. The Additional Committee members should consist of people who are not official search committee members but who should still have access to review applicant materials (e.g. Grad students). Contact [help@aait.ucsb.edu](mailto:help@aait.ucsb.edu) if unable to pull up a name from the directory.

* **Committee Chair** – can manage applicant files but cannot create or edit recruitments or initiate reports. Typically one faculty is assigned this role but the department may designate more than one committee chair.
* **Faculty Editor** – has the same level of access as the Committee Chair. Normally limited to one Faculty Editor per search committee.
* **Reviewers** – have access to view applicants that show on the Qualified pool on the Applicants list page. This role cannot manage applicant files. This is the most common level of access assigned to committee members who are not search chairs. *Note: analysts may bulk-assign department faculty under “+ Add members”*

*Core Committee (for multiple entries, separate with commas):*

Committee Chair [Enter name, email, or UCSB NetID]

Faculty Editor [Enter name, email, or UCSB NetID]

Reviewers [Enter name, email, or UCSB NetID]

*Additional Access (optional):*

Additional Chair [Enter name, email, or UCSB NetID]

Additional (Staff) Editors [Enter name, email, or UCSB NetID]

Additional Reviewers [Enter name, email, or UCSB NetID]

Please note: It is not necessary for staff with department analyst access to be assigned committee roles – all analysts with UC Recruit access in a particular department automatically have access to that department’s searches.

1. **Documentation Tab**

*Search Plan Documents* (*optional*) – Any additional documents approvers should see when viewing the Search Plan.

Please note: Other areas in this Documentation section, *Letters and Memos* and *Interview Materials*, will be used at the Search Report stage.

1. **Disposition Reasons Tab**

Disposition Reasons explain the basis for the deselection of a candidate. The department must assign a Disposition Reason to individuals who submitted a complete application by the Review/Final Date if the individual is not chosen as a Proposed Candidate. (Second-choice candidates may be assigned “Alternate for Position”). During preparation of the Search Plan, the search committee custom Disposition Reasons if needed. These must be proposed, reviewed and approved as part of the Search Plan. During Search Plan preparation, it is also possible to suppress Disposition Reasons that do not apply to a particular recruitment *(indicate from list below, if desired).*

***Disposition Reasons are locked after Search Plan approval and cannot be changed***

*(Optional) Mark in box to suppress– leave unmarked if unsure*

System Disposition Reasons for **Qualified** applicants (marked Meets Basic Qualifications):

Alternate for position

Duplicates or significantly overlaps existing area of strength in department/school/college

Interview showed some deficiencies

Job talk showed some deficiencies

Lacks sufficient clinical experience

Lacks sufficient contributions to diversity/cultural competence

Lacks sufficient depth/breadth of research/creative excellence or impact

Lacks sufficient leadership experience for position

Lacks sufficient potential for successful attraction, advising, and mentoring of students/trainees/postdocs

Lacks sufficient research achievement/potential

Lacks sufficient teaching achievement/potential

Other, please specify ***(if this is assigned to applicant, a comment must be included)***

Publication record shows some deficiencies

References were weak

Specialization or area of expertise for position or department needs shows some deficiencies

System Disposition Reasons for **Unqualified** applicants (marked Does Not Meets Basic Qualifications):

Application was incomplete, materials submitted were not the required materials

Candidate withdrew

Degree was not in the advertised field(s) if specific field(s) were required

Did not meet stated basic clinical requirements

Did not meet stated basic research requirements

Did not meet stated basic service requirements

Did not meet stated basic teaching requirements

Did not meet stated basic years of experience required

Did not possess basic degree requirements stated in advertisement

Did not possess stated credentials (e.g., board eligibility/board certification)

Other, please specify ***(if this is assigned to applicant, a comment must be included)***

*If the committee wishes to propose custom Disposition Reasons, check the box here and fill in below:*

[Enter Custom Disposition Reasons – optional]

1. **Conclusion Tab** – Do not make entries to this section during the Search Plan stage.
2. ***Submit the Search Plan:***

Once the draft Recruitment Plan is ready, you must click on *Submit It for Approval* in order to initiate the review and approval process. Please note:

* Approvers may suggest changes or have questions as they review your search plan.
* ***Respond promptly***; notify approvers if you make unsolicited changes while the plan is under approval.
* Once plan is fully approved, you will receive an automated system notification.
* Adjust the Open Date, if necessary, and Publish so that the recruitment is viewable to applicants.
* Place ads and outreach as outlined in the plan.

**Please Note:**

* The department must upload and submit the Search Plan within UC Recruit.
* The Search Plan should include all versions of planned print or electronic ad copy.
* All approvers must have reviewed and approved the Search Plan ***before*** the department may advertise the position.

Questions? Email [help@aait.ucsb.edu](mailto:help@aait.ucsb.edu) or contact your AP analyst