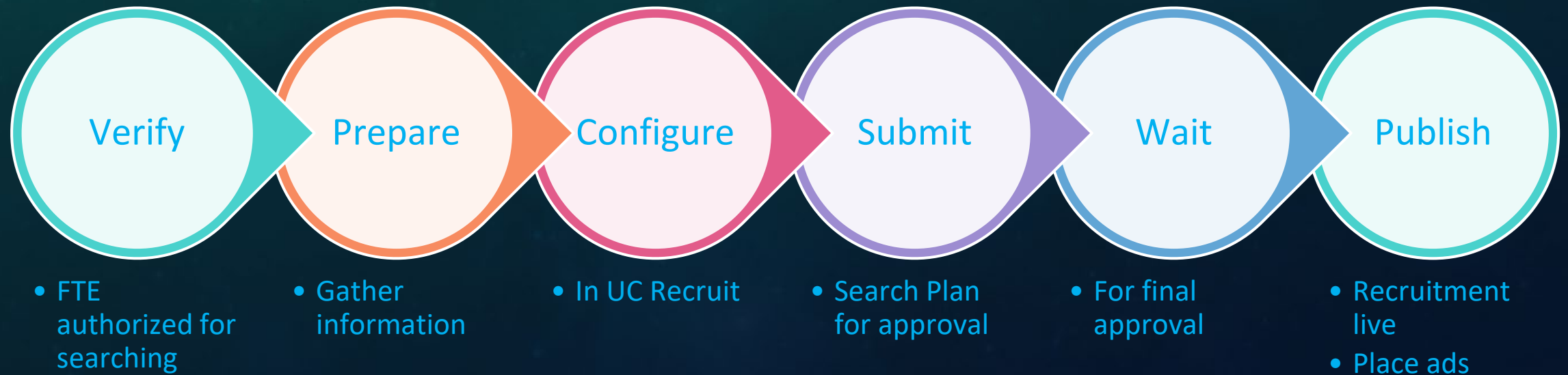


The background is a dark teal gradient with abstract white and light teal circular patterns. On the left, a large circular scale with degree markings from 140 to 260 is visible. Several concentric circles and arcs with arrows are scattered across the left side, suggesting a circular or rotational theme.

Search Plans in UC Recruit

Spring 2025

Search Plan Process






Prepare

- Work with your department AP Analyst to establish procedure and parameters
- AP Website:
 - Resources for Dept Analysts -> UC Recruit -> Creating a Recruitment

- **Creating a Recruitment**

- UC Recruit System Resources:

- Review the [Create Recruitment Plan](#)  help section within UC Recruit for information on various fields and steps.
 - Review the [How to create a multi-level](#)  help section within UC Recruit for information on creating a multi-level recruitment.
 - Review the [Multi-level changes](#)  help section within UC Recruit for information on the types of changes that can be made to applications with a multi-level recruitment, or to the recruitment configurations themselves.

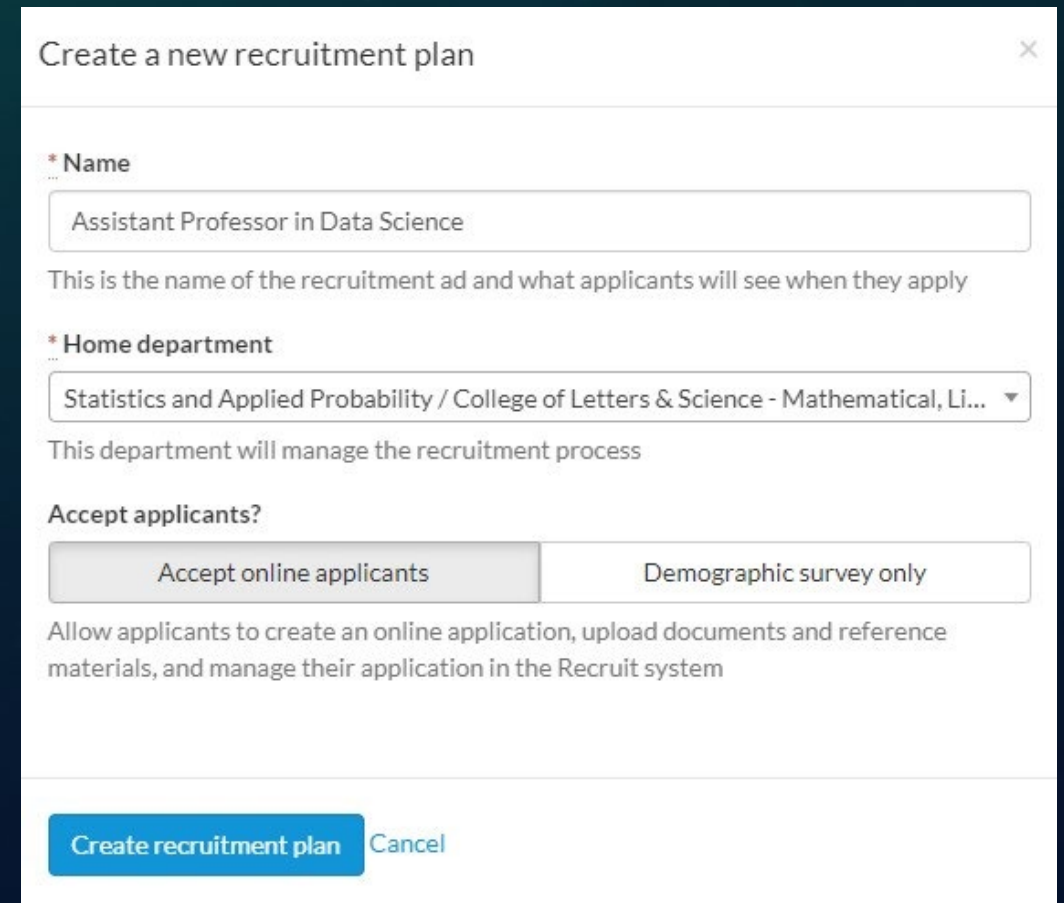
- UCSB Resources:

- [Search Plan - Worksheet](#)  (rev. 4/23/2021)

This is a checklist/form including the various fields available when creating a recruitment. Consult with search committee members where applicable to ensure the recruitment is configured in accordance with expectations.

Configure: Gather Basic Info

- **Name** of the recruitment plan. Include:
 - Job title
 - Area of specialization
 - Department
- **Home Department**
 - The recruiting department that will manage this search
- **Accept Applicants**
 - Configure online application intake



The screenshot shows a web form titled "Create a new recruitment plan" with a close button (X) in the top right corner. The form contains the following fields and options:

- * Name**: A text input field containing "Assistant Professor in Data Science". Below it, a note states: "This is the name of the recruitment ad and what applicants will see when they apply".
- * Home department**: A dropdown menu showing "Statistics and Applied Probability / College of Letters & Science - Mathematical, Li...". Below it, a note states: "This department will manage the recruitment process".
- Accept applicants?**: Two radio button options: "Accept online applicants" (which is selected) and "Demographic survey only". Below these, a note states: "Allow applicants to create an online application, upload documents and reference materials, and manage their application in the Recruit system".

At the bottom of the form, there are two buttons: "Create recruitment plan" (in blue) and "Cancel" (in light blue).

Configure: Search Info

- Details – general info about the recruitment
- Position – details about the position
- Description – details about the job duties
- Requirements – application doc & reference requirements
- Qualifications
- Demographics
- Advertisements – where you will place your ads
- Selection Process – how you will arrive at a finalist
- Committee – members of the search committee

SEARCH INFO

Details

Position

Description

Requirements

Qualifications

Demographics

Advertisements

Selection process

Committee

Documentation

Disposition reasons

Conclusion

APPROVALS

Search plan

1

Applicant pool

Shortlist

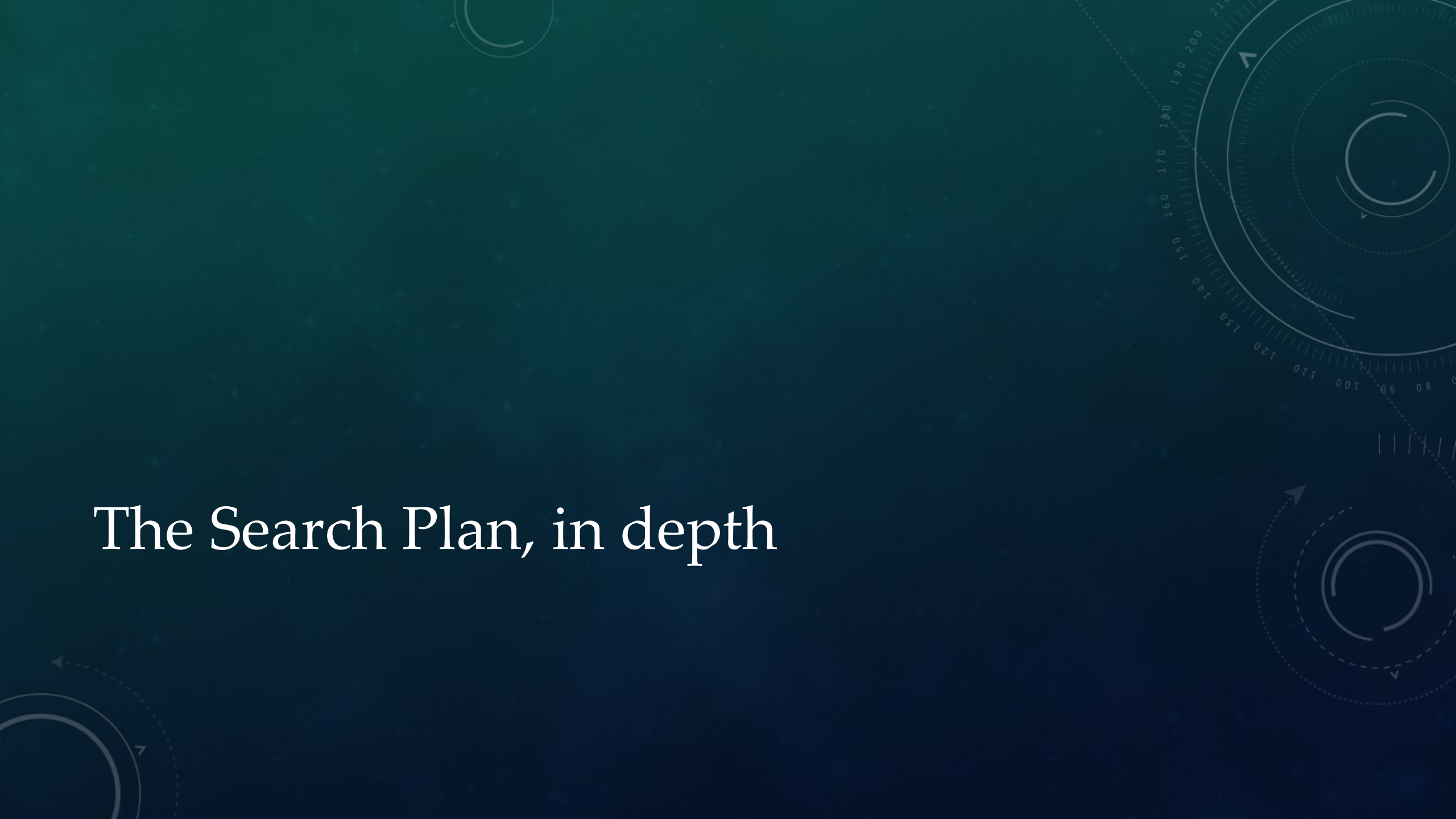
Search report

TOOLS

Activity log

Delete recruitment

The Search Plan, in depth



Details

Details

⛔ Applicants cannot apply to the recruitment because it is not yet published. When it is, applicants can apply to the recruitment on Oct 1, 2023

[https://recruit.ap.ucsb.edu:48908/JPF00660\(Preview\) AD](https://recruit.ap.ucsb.edu:48908/JPF00660(Preview) AD) [Download Advertisement](#) ⌚ Not submitted for approval

🌐 Not published

General information [Edit](#)

AD Name	Assistant Professor in Astrophysics
AD Job number	JPF00660
AD Home department	Physics / College of Letters & Science - Mathematical, Life, and Physical Sciences

✓ Dates [Edit](#)

Submission process	Review windows
Academic year	2023/24
AD Open date	10/1/2023 (Sunday)
AD Initial review date	10/31/2023 (Tuesday)
AD Final date	6/30/2024 (Sunday) ?
Days open	273 days

✓ Search tracking [Edit](#)

Salary control	PHYS18C
Search breadth	Open search
Initial search allocation	Newly Allocated
Approved search area	Astrophysics and Cosmology

🟡 Contact information [Edit](#)

Address	Missing
Faculty/Staff contact	Annabel Analyst ?
Public contact	Annabel Analyst ?
AD Help contact	Help ?

Internal analyst notes [+ Add](#)

Not yet provided

Used by analysts, search committee & system to contact you. Not visible to applicants.

Applicants and References contact name, i.e. automated emails

Applicant questions via "Contact us" form will be sent here

FTE Identifier (SAID), as approved by the EVC's office (Senate only)

Search areas, as approved by the EVC's office

Candidate has until 11:59pm to submit app; search committee *should not* review apps until after 12:00am on Nov 1

Last day an applicant can submit an application.

A note on review windows

- Searches are set up with “Review Windows”:
 - Open Date – date recruitments opens; applicants can apply starting then
 - Initial Review Date – applicants have until 11:59pm of this date to submit an application.
 - Must be at least 30 days from open date for Senate searches (14 days for non-Senate searches)
 - Final Date – last date an applicant can submit an application
 - However, they may not be considered if they do not apply within a review window
- Additional review dates may be added
 - If initial pool is not robust enough (conduct additional outreach/advertising)
 - If first round of applications did not result in a competitive shortlist

Position

- May have ramifications for Add'l Qualifications
- Best practice: include “or later” when applicable, e.g. “July 1, 2024 or later” – but this doesn’t extend in perpetuity!

Position

Position details

[Edit](#)[Search plan](#)[Search report](#)

AD	Job location	Santa Barbara, CA
AD	Salary range	A reasonable estimate for this position is \$95,000 - \$140,000.
AD	Anticipated start	Fall 2024 or later
AD	Review timeline	Not yet provided
AD	Position duration	Not yet provided
AD	Percent time	100%
	Rank/Step	Not yet provided

What is listed here is expected to be adhered to. If it specifies UCSB, do not engage in discussion or negotiations for remote work.

NEW

This is the simplest way to convey the salary range.

Title information

[Edit](#)[Search plan](#)[Search report](#)

Title code	001300: ASST PROF-AY
Senate level	Senate ?
Availability cohort	Other Academic Positions ?
AD Position title	Assistant Professor ?

A note on Salary Ranges

- SB 1162: requires the university's job ads to include pay scale for a position
- What is a "pay scale"?
 - The salary or hourly wage range you reasonably expect to pay for the position
 - Typically expressed as a range, e.g. "\$95,000 -- \$140,000 annually"
 - Must be included in all ads, even short ads
- Salary offered to finalist MUST fall within this \$X -- \$Y range
 - Cannot offer less than \$X or more than \$Y (range adjustments notwithstanding)
 - Take into account rank, market factors, potential competing offers, etc, when setting this range
- <https://ap.ucsb.edu/resources.for.department.analysts/content/UCSB.Implementation.AB.168.and.SB.1162.pdf>

Description

Recommended Info:

- Position Name or Title
- Department
- Job duties and area of specialization

Optional:

- Information about dept

Description



Position description

Edit

Search plan

AD Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

About UC Santa Barbara

About campus text is set by your campus admin and will appear in the ad

AD As a condition of employment, the finalist will be required to disclose if they are subject to any final administrative or judicial

Job description details

Requirements: References

- Three options:
 - Letters of Recommendation
 - Applicants must provide name and contact info for references, AND trigger the solicitation for letters in UC Recruit, in order to complete and submit application
 - Contact Information Only
 - Applicants must provide name and contact info for references. No letters are solicited at time of application
 - Decide at what point in the recruitment the references will be contacted
 - None
- Reference Process Explanation
 - Applicant-facing! Describes how/when their references will be used
 - Be aware of ramifications of the reference option chosen!

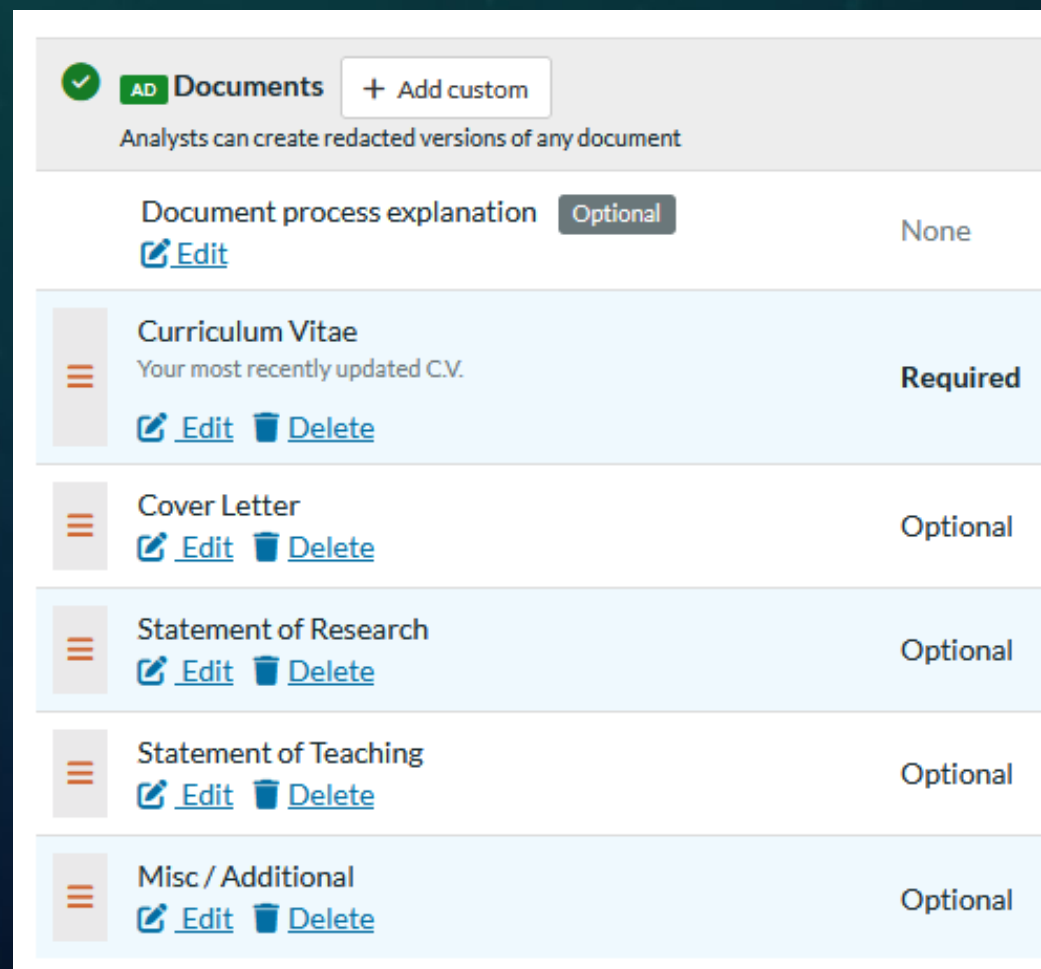
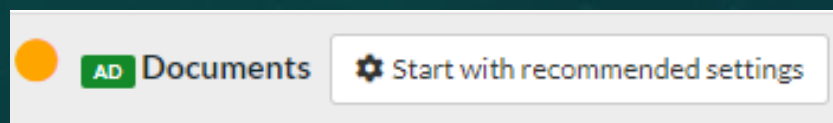
Reference Process Explanation– Examples

- Letters of Recommendation:
 - Applicants should provide the names and contact information for at least 3 references, and must request letters of references within the UC Recruit system in order to complete application requirements
- Contact Information Only:
 - Applicants who advance to the shortlist will have their references contacted by the department. Solicitations will be sent out at the time that shortlisted applicants accept an invitation for interview. Applicants should provide 3-5 names with contact information.
 - Applicants are required to provide the names and contact information for a minimum of 2 references and may submit up to 2 additional optional references. Applicants should inform their references that they may be contacted by the department at any time during this recruitment.
 - Please provide the names and complete contact information for 3 references. The department will conduct a reference check for the finalist before extending an offer










Documents

- Documents are set as Required or Optional
 - Add or delete slots
 - Any documents set as “Required” must not act as placeholders (e.g. a CV uploaded to all slots – the system cannot distinguish the content)
 - Carefully consider the “Required” setting – applicants who have not uploaded the correct required documents cannot be advanced in consideration
- Add descriptions to the documents for further context
- “Misc/Additional” optional slot auto-populates
 - Should not leave this as-is: too open-ended and leads to inconsistent applications
 - Rename/repurpose or delete

Documents (default)



Documents (configured)

<div> AD Documents + Add custom</div> <div>Analysts can create redacted versions of any document</div>		
	Document process explanation Optional	None
	Edit	
	Curriculum Vitae Please submit a complete and up-to-date CV including full publication, funding, teaching, and mentorship records.	Required
	Edit  Delete	
	Cover Letter Cover letter should express interest in the position and strengths you would bring to the department.	Required
	Edit  Delete	
	Statement of Research Address your past research accomplishments, current work, and/or future research plans. This statement may also include information about possible areas of collaboration within the department or campus (2-4 pages)	Required
	Edit  Delete	
	Statement of Teaching Describe your teaching and mentoring experience, pedagogical ideology and methods, and teaching philosophy and approaches (1-3 pages)	Required
	Edit  Delete	

Qualifications

Basic

- Objective
- Non-comparative
- Relevant to position
- Verifiable through application materials alone

Additional

- Same parameters as Basic Quals!
- Also required
- Must be met by start date

Can be problematic if these are not met by anticipated start date advertised in the “Position” tab.
Recommend qualifying anticipated start date in Position details with “or later” to allow flexibility

Preferred

- Desirable but not required

Qualifications

- Basic AND Additional:
 - Non-Comparative
 - e.g. three years' experience in a particular position, rather than a comparative requirement such as "must have the most years' experience, among all candidates"
 - Objective
 - e.g. "an advanced degree or enrolled in an advanced degree program at the time of application" but not "a technical degree from a good school"
 - Relevant to the performance of the particular position
 - Discrete and verifiable by evidence or statements in the applicant's submitted materials (or through an interview for additional qualifications)
 - e.g. specific degree requirement or "1 year of teaching experience" vs "1 year of experience programming with Python" → the latter might be better in Additional Qualifications

Qualifications, cont'd

- **Basic:** required at the time of *application*
 - Should be able to be discerned @ initial screening of application materials alone
 - Dept AP analyst should do this assessment after review date passes
- **Additional:** required at the time of *appointment start date*
 - Should be thought of as minimum requirements necessary to perform the job
 - Can be discerned at later stages of review, e.g. interviews
 - Failure to meet any of these add'l requirements (by the advertised anticipated start date) = disqualified for hire
- **Preferred:** desirable but not required

Qualifications: Scenario #1

- Search is set up with Basic Qualification of “PhD degree in Earth Sciences”
 - IRD = Aug 1, committee begins reviewing applications on Aug 2
- Applicant Smith applied on June 1, indicating their PhD is expected to be conferred July 1. Does Applicant Smith meet basic qualifications?
 - No, because they did not have the PhD in hand at the time they *applied*
- Applicant Doe already has a PhD in Oceanography when they apply. Do they meet basic qualifications?
 - No, unless the Basic Qualifications were listed with an “or related field” qualifier

Qualifications: Scenario #2

- Search is set up with Basic Qualification of “Master’s Degree”
- Applicant Jones is a PhD candidate (has advanced to candidacy)
 - They were not formally conferred a Master’s degree along the way
- Does Jones meet Basic Qualifications?
 - Yes, because the educational level of PhD candidacy exceeds that of a Master’s degree

Qualifications

Qualifications

✓ Basic qualifications (required at time of application) [SEARCH PLAN](#) [Edit](#)

AD The minimum requirement to be considered an applicant is the completion of all requirements for a PhD (or equivalent degree) in Physics, Astronomy, Engineering, or a related field, except the dissertation at the time of application.

Additional qualifications (required at time of start) [SEARCH PLAN](#) [Edit](#)

AD PhD (or equivalent degree) in Physics, Astronomy, Engineering, or related field by the time of appointment.

Preferred qualifications [SEARCH PLAN](#) [+ Add](#)

AD Not yet provided

Demographics

- Availability Demographics
 - Based on Fields of Study: https://recruit.ap.ucsb.edu/analyst/help/resources#fields_of_study

Demographics								
✓ Availability demographics Edit								
The demographics of candidates available in each field of study identified.								
Field of study	Male	Female	Native American	African American	Hispanic	Asian	Minority Total ?	White
Campus: Computer and Information Sciences, General	79.5%	20.5%	0.2%	5.5%	3.9%	13.4%	25.8%	65.8%
Campus: Computer Engineering, General	84.8%	15.2%	0.0%	5.7%	6.3%	15.9%	31.3%	58.3%
Campus: Computer Science	82.1%	17.9%	0.2%	5.0%	4.9%	14.7%	27.7%	59.7%
Average ?	81.8%	18.2%	0.2%	5.2%	4.8%	14.5%	27.7%	61.3%

Advertisements

- Planned Search & Recruitment Efforts
 - Description of planned advertisement and outreach efforts in order to reach a broad applicant pool
- This stage provides the chance to cultivate a highly-qualified, comprehensive applicant pool. It is important to identify and follow through on advertising and outreach throughout the recruitment
 - If the committee plans to advertise and conduct outreach be sure to check that it is available and within the budget

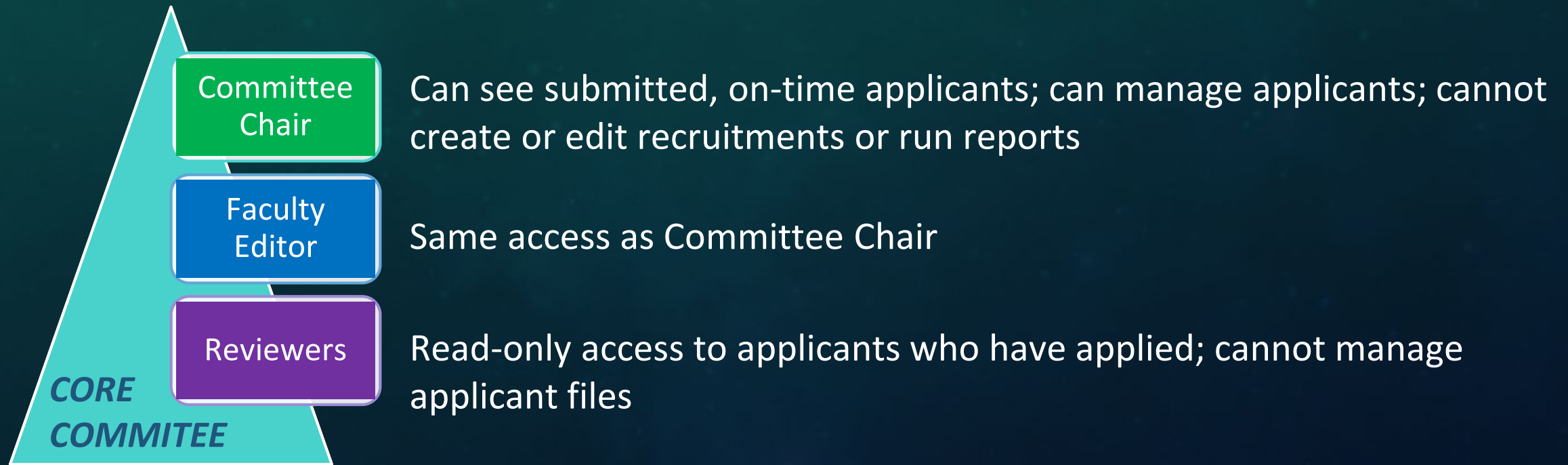
Selection Process: Selection Criteria

- These are the criteria the committee uses to assess applicants
- Should take into account Basic, Additional, and Preferred Qualifications
- Include additional info about how some of these qualifications are assessed, e.g.
 - “Strong oral communication skills” might be listed as a Preferred Qualification, but how do you judge this? Could be based on job talk, etc... explain this in the Selection Criteria
- Criteria should be specific, measurable, and tied to the skills, experience, and expertise required for the posted position

Selection Process: Selection Plan

- Road map the search committee expects to follow to arrive at a finalist
- Should include steps committee will take and evaluation tools it will use, from
 - Start (applicant intake)
to
 - Finish (finalist selected)
 - How will applicants be screened? What evaluation protocols are in place? Voting procedures? How will interviews be conducted? Will there be a long shortlist and/or shortlist? How/when will reference letters be used? Etc...
- Search committee is expected to follow this process when reviewing, managing, and interviewing applicants

Search Committee



- Department staff should not be added as committee members, as they already have staff admin access to UC Recruit.
- Graduate students should not be added to the committee in UC Recruit. It is more appropriate for them to be involved in later stages outside UC Recruit, e.g. attending job talks, lunch with the candidate, provide feedback to committee

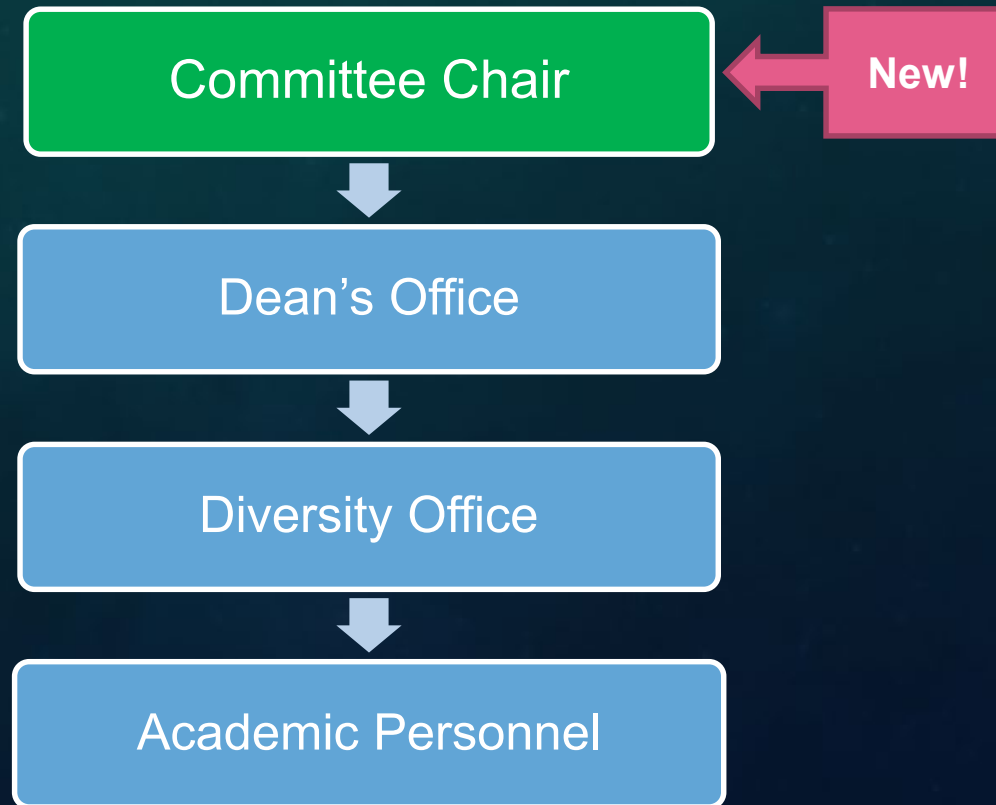
Search Committee: Conflict of Interest

- Can arise between applicant and faculty, e.g.
 - Committee member was applicant's PhD advisor
 - Voting faculty asked to write letter of reference in UC Recruit
- Mitigation plan encouraged
 - Can be included in Selection Plan info
 - Must be explained in Search Process summary document

Final Steps

- Submit Search Plan for approvals
- Dept should await feedback and promptly respond to/resolve Change Requests from approvers
- Upon final approval, dept publishes the Search Plan and places ads
- Wait for applicants to apply

Approval Workflow



Some Notes on Applicant Management

The background is a dark teal gradient. It features several faint, light-colored circular elements. In the top right, there is a large circular scale with degree markings from 0 to 210 and a dashed line with an arrow pointing clockwise. In the bottom right, there are concentric circles with arrows indicating a clockwise flow. In the bottom left, there are more concentric circles with arrows. The overall aesthetic is technical and modern.

Applicant Management

- Applicants must first assemble all required materials and then explicitly hit the “Submit” button to send their application to your recruitment for consideration
 - Will be listed as “Applied” on your applicant list
 - Application is locked and further edits may not be made
- As you’re reviewing qualified applications, make updates in *real time*:
 - Update applicant statuses
 - Assign disposition reasons
 - Don’t wait to do this at the time of Shortlist/Search Report submission!
 - Fair hiring practices are documented, e.g. timestamps and activity logs

Applicant Statuses and Disposition Reasons

- ☒ **Applied (current):** Application has been completed and is ready for evaluation and review
- ☐ **Serious consideration:** Applicant should be considered for the shortlist
- ☐ **Recommended for preliminary interview:** Applicant recommended to receive a preliminary interview to judge qualifications
- ☐ **Preliminary interview completed:** Applicant has received a preliminary interview to judge qualifications
- ☐ **Recommend for interview:** Applicant recommended for interview
- ☐ **Interviewed:** Applicant has been interviewed
- ☐ **Soft offer extended:** A verbal or informal offer has been made to the applicant, even if it lacked some offer details
- ☐ **Declined soft offer:** The applicant declined a verbal or informal offer based on the details they were given
- ☐ **Proposed candidate:** Applicant recommended for appointment
- ☐ **Declined soft offer after proposed candidate:** After being recommended for appointment, the applicant declined a verbal or informal offer based on the details they were given
- ☐ **Offered:** Approvals have been obtained and a formal offer has been made to the applicant
- ☐ **Accepted offer:** Approvals have been obtained and a formal offer has been accepted by the applicant
- ☐ **Declined offer:** Approvals have been obtained and a formal offer has been declined by the applicant
- ☐ **Hired:** Applicant entered in payroll system in searched title
- ☐ **Withdrawn:** Applicant has withdrawn themselves from consideration




- **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**
- **Publication record shows some deficiencies**
- **Reference letters were weak**
- **Specialization or area of expertise for position or department needs shows some deficiencies**

Short List

- Short List report must be submitted and approved in UC Recruit prior to inviting Senate candidates to campus for interviews
- Interviews
 - Ensure consistency across all candidates
 - Keep questions job-related; focused on skills, experience, abilities relevant to job
 - Exercise caution if conversation goes into more personal details, e.g. during meals
 - <https://ap.ucsb.edu/resources.for.department.analysts/content/DFEH.Empl.Sheet.and.Interview.Qs.to.avoid.pdf>

Interview Questions: Do's and Don'ts

Which of the following possible interview questions are problematic in light of the California Department of Fair Employment & Housing guidance?

-  • What country are you from originally? OR: What kind of visa do you have currently?
-  • Are you currently authorized to work and accept new employment in the U.S. on a full-time basis?
-  • Do you have any conditions that might require accommodations?
 - Employer may only ask if an applicant can perform job-related functions

Search Report

- Search Report is required prior to submission of appointment case
 - Soft offer is **NOT** the formal offer (formal offer can only be issued by AP Office upon completion of appointment case)
- Search Process Summary is an important component of the Search Report
 - Describe the process used to determine the Proposed Candidate
 - Include any changes or deviations from the Selection Process
 - https://ap.ucsb.edu/resources.for.department.analysts/content/Search_Report_Guidelines.pdf

Other Search Types



Multi-Level Searches

- Recruiting for multiple ranks, e.g. open rank (Asst, Assoc, Full), or tenured (Assoc, Full)
 - If FTE approved @ more than one rank
- Allows for:
 - Applicants to select level they are applying for
 - Setting different document/reference requirements for different levels
- Must share one single set of Basic Qualifications regardless of level

Position tab: Title details

✔ Title and level information

Edit

Search plan

Search report

Assistant Professor

AD	Applicant instructi...	Individuals should submit their application at this level if they meet one of the following conditions: Current or recent PhD candidate or graduate; current or recent postdoc; current assistant professor (including those who are "senior" assistant professors near tenure). Please note that this level determination is only for application review purposes, not the ultimate appointment level of the finalist.
	Title code	001343: ASST PROF-AY-B/E/E
	Senate level	Senate ?
	Availability cohort	Other Academic Positions ?
AD	Position title	Assistant Professor ?

Associate or Full Professor

AD	Applicant instructi...	Individuals should submit their application at this level if they meet one of the following conditions: Current tenured professor; position equivalent to tenured professor or position (e.g., at an international university). Please note that this level determination is only for application review purposes, not the ultimate appointment level of the finalist.
	Title codes	001143: PROF-AY-B/E/E 001243: ASSOC PROF-AY-B/E/E
	Senate level	Senate ?
	Availability cohort	Tenured / SOE ?
AD	Position title	Associate or Full Professor ?

Requirements

- Application requirements may be set up differently for different levels
- Some documents may be “required” for one level but “optional” or “not requested” for another level
- References = most common divergence of requirements, e.g.
 - Letters required for Asst Prof level
 - Contact info only for tenure level
 - Why? Because tenured faculty may not want to let their current institutions know they are on the job market unless they advance in consideration

Requirements: example

Requirements		
Search plan First applicant AD		
	Assistant Professor	Associate or Full Professor
✓ References ⚙ Setup		
Reference type	Letters of recommendation 3 required; 2 optional (5 total)	Contact information only 3 required; 2 optional (5 total)
Reference process explanation	Applicants for the Asst Prof level should provide the names and contact information for at least 3 references, and must request letters of reference within the UC Recruit system in order to complete application requirements.	Please provide the names and contact information for at least 3 references. Candidates who advance to the short list will have their references contacted and letters solicited after their on-site interviews.

Pooled Recruitments

- For multiple positions in the *same* title and performing the *same* job duties
- Most common: Lecturer pools
 - Can also be used for some research titles, if appropriate
- Add additional review windows as new needs arise
 - Must evaluate entire pool (including those considered during previous review windows, unless permanently deselected)
- Recruitment windows
 - Lecturer searches: must close on 3/31 every year
 - Other titles: may remain open for up to 365 days from Open Date

Upcoming Workshops

- More offerings of Search Plan workshops for Search Committees
 - **Summer 2025** (in preparation for 25-26 recruitment cycle)
 - Wednesday, July 30, 2025
 - Thursday, Sep 4, 2025
- Workshops for Staff
 - Search Plan Workshop: Tuesday, Aug 5, 2025
 - Applicant Management: Tuesday, Nov 12, 2025
 - General Recruitments Workshop: Tuesday, Dec 2, 2025



Questions?