Academic Recruitments Workshop

December 3, 2024

Agenda

- New applicant statuses

- Approval workflows and search committees

- Turnstile reminder

- Kickboard: Batch round processing for pool recruitments

- SB 791/AB 810 (and SB 1162 reminders)

- Staff and faculty training
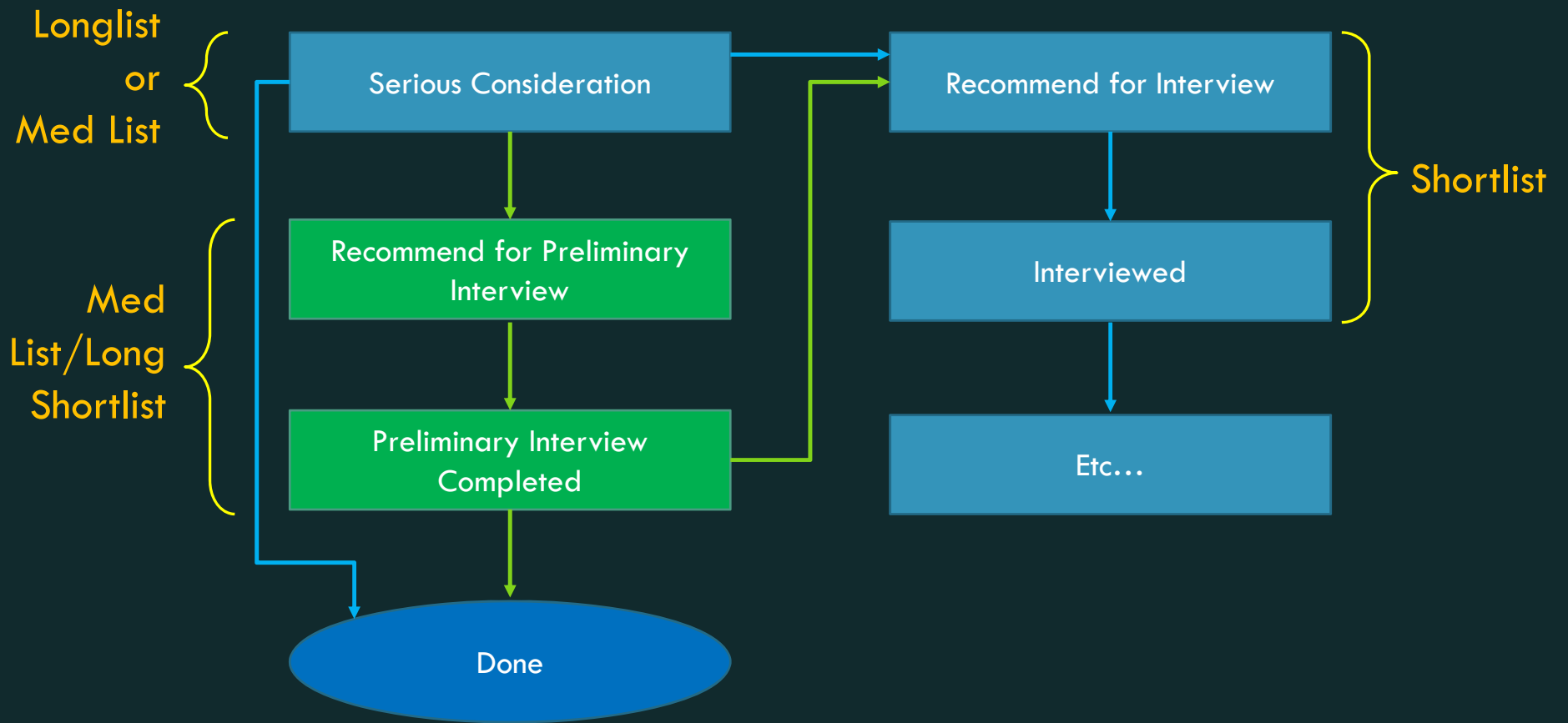
UC Recruit: Applicant Statuses

- Applied (current): Application has been completed and is ready for evaluation and review
- Serious consideration: Applicant considered for advancement
- 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- Withdrawn: Applicant has withdrawn themselves from consideration

New applicant statuses available

Note:
These new statuses are *optional*, and can be used if your Selection Plan involves culling your applicant pool into multiple iterative stages
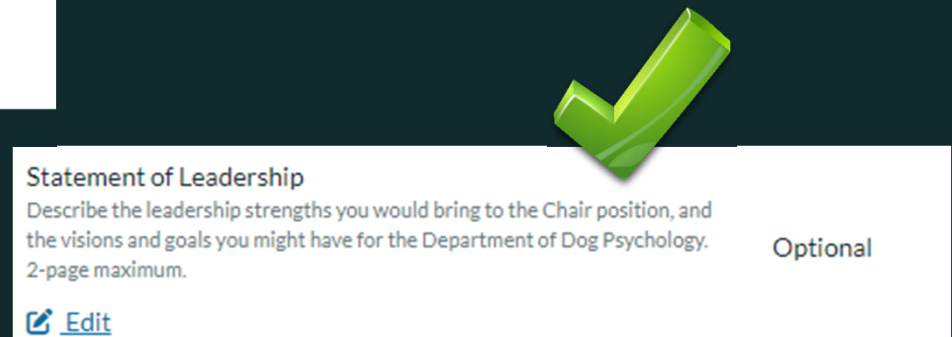
Applicant Processing

- Does it matter when applicant statuses are marked in the system?
    - Yes, applicant review conducted within system in approx. real time is recommended

- Why?
    - Efficient workflow for department analysts
    - Online system – over-reliance on applicant downloads not recommended
    - Fair hiring practices are documented, e.g. timestamps and activity logs
    - OEO reports grab recruitment & applicant information as of "real time"

Misc/Additional Document Slot

- Populated by default

- If you choose to use it, RENAME the title and EDIT its description to reflect exactly what documentation the search committee wants
  - Otherwise, just delete the slot

Misc / Additional
Edit   Optional

Statement of Leadership
Describe the leadership strengths you would bring to the Chair position, and
the visions and goals you might have for the Department of Dog Psychology.
2-page maximum.   Optional

Edit

Document Process Explanation

- Optional field: tells applicants how you will collect and review documents.

- Can be used, e.g. to let applicants know that additional documents may be required of finalists, so applicants can prepare them ahead of time.

AD Documents + Add custom

Analysts can create redacted versions of any document

Document process explanation **Optional**

✐ Edit

Finalists who are selected for interview will be asked to submit a 2-page writing sample consisting of an essay or article on topics related to underwater basket weaving.

Curriculum Vitae
Your most recently updated C.V.

Required

✐ Edit

Optional slot for additional materials

- In addition to the Document Process Explanation in the previous slide, label the optional document slot accordingly.

Approval Workflow

```
┌─────────────────────────────┐      ┌─────────┐
│      Committee Chair         │◄─────│  New!   │
└─────────────────────────────┘      └─────────┘
              │
              ▼
┌─────────────────────────────┐
│        Dean's Office         │
└─────────────────────────────┘
              │
              ▼
┌─────────────────────────────┐
│       Diversity Office       │
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│      Academic Personnel      │
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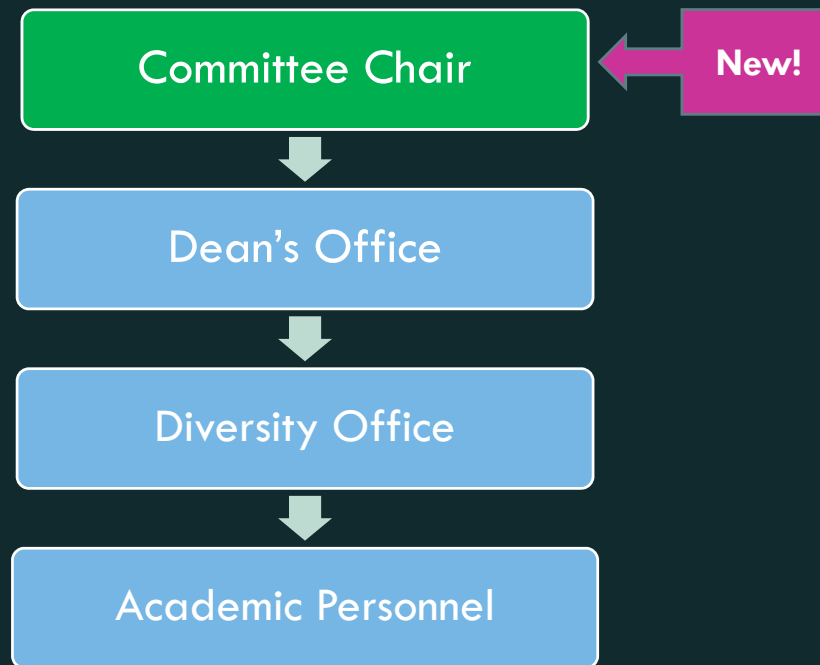
Search Committee Composition

- Committee Chair and Faculty Editor
  - Can see complete, on-time applications and manage them
- Reviewers
  - Read-only access to complete, on-time applications (cannot manage)
- Graduate Students should not serve on the core committee
  - Access/confidentiality issues; lack of UC Recruit training
  - They can participate in the search in other ways without UC Recruit search committee access
- Dept staff should not be added; they already have admin access

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

Turnstile: Applicant Submissions are Final

- Upon creation of an application, applicants may gather and swap out their application materials as often as they like... UNTIL they hit the "Submit" button, which:
  - Commits their application materials to this recruitment
  - Updates their status to "Applied" in this JPF
  - ***Locks down their materials from further edits!***

Turnstile- Applicant View

Application status 🟠 Application complete – Submit when ready **Submit now**

Submit application ✕

Your application is now complete. When you are ready, you can submit your application to the committee for their review.

When you submit, your application will be sent to the committee, and no further changes will be possible. By submitting your application, you are confirming that your information and materials are correct and ready for review.

Yes, submit and lock my application   No, continue editing

Application status ✅ Application submitted

Recruitment deadline 🔒 No further changes may be made to your application as it has been submitted ❓

Turnstile – Department View

Submitted application on time. Assessed as MBQ. May consider further.

Applied on time but still need BQ assessed.
Do not consider further until BQ has been assessed.

Have not yet *submitted* application.
Do not consider.

Submitted application outside review window.
Do not consider unless additional review date added.

Should application updates be allowed?

- Applicant sends an updated CV to department analyst, requesting that they replace existing CV with new one
  - A couple of new articles have been published and added to new CV
- Should the department accommodate this request?

No!

- Would not be fair or equitable to do so
  - Turnstile already provides ample warning that application is locked down from further edits after submission
  - If they were anticipating an update, they should have waited to submit

Project Kickboard

- Enhanced support for pooled recruitments
- Enables clearer batch rounds of consideration
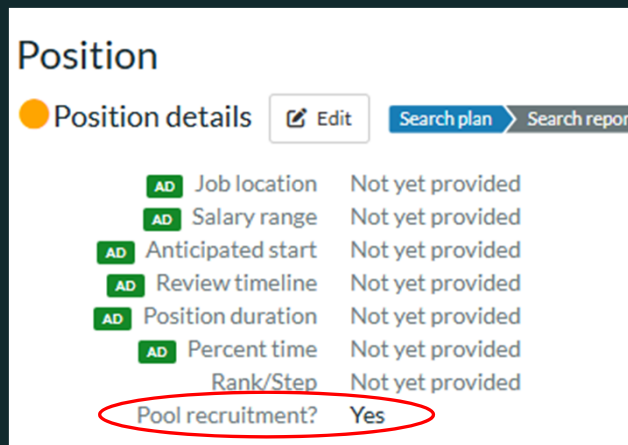
Batch Rounds

- Allows user to create new batches of applicants

- Batches can be driven by needs, e.g.:
    - New teaching needs arise in Lecturer pool
    - Different PI wants to use the pool to hire someone in Specialist pool

- Based on review dates– cannot create until review date passed

- All applicants within the included review date(s) will be included in the batch
    - Applicant statuses below Proposed Candidate reset with each batch ⚠️

Setting up a Pool Recruitment

- Edit "Position details" section in Position tab:

- Set "Pool recruitment?" to YES to enable Batch Round functionality
  - If you select "No", you can simply process your search in the current manner, whether it's a pool or single-hire search

Batch Rounds – UC Recruit

SEARCH INFO

Details
Position
Description
Requirements
Qualifications
Diversity
Advertisements
Selection process
Batch rounds
Committee
Documentation
Disposition reasons
Conclusion

Batch rounds

Adding a batch round allows you to group applicants to make reviewing and reporting easier

📝 Add batch round

Creating a Batch Round

These criteria must be met before you can create a batch round

Provide a meaningful name for this batch

Enter relevant info here, e.g. courses to be taught, specializations needed, etc

Creating a Batch Round

- Once created, you can access it via the "Batch Rounds" tab from the recruitment's main page

Name	Created on	Review windows	Additional information	Search report	Applications	Status
[1] Winter 2025 teaching needs	Nov 25, 2024	Nov 20, 2024	Need instructors for CS 061 and 161.		View applications	Current

- Click on "View applications" to see only those applicants who fall within this batch round

Winter 2025 teaching needs ◯ ▼	Basic qualifications: Entire pool ▼	Not hidden ▼
	Status: Applied; Recommend for interview ▼	⚙ Edit filters & columns
	Batch rounds: [1] Winter 2025 teaching needs ▼	

Mark selected as: [Read ▾] [Visibility ▾] [Basic qualifications ▾]　Bulk actions: [✉ Send email] [🖾 Request letters] [⬇ Download files ▾] [▨ Redact documen]

☐ Applicant ⇕	Status ⇕	Batch rounds	All evaluations
☐ **Sawayn, Synthia** ●●● ☰ Log ☁ Download	Applied ❓ by applicant	[1] Winter 2025 teaching needs	[1] Winter 2025 teaching needs Evaluation not yet provided
☐ **Lehner, Leonard** ●●● ☰ Log ☁ Download	Applied ❓ by applicant	[1] Winter 2025 teaching needs	[1] Winter 2025 teaching needs Evaluation not yet provided
☐ **Gusikowski, Shad** ●●● ☰ Log ☁ Download	Applied ❓ by applicant	[1] Winter 2025 teaching needs	[1] Winter 2025 teaching needs Evaluation not yet provided
☐ **Grimes, Salvador** ●●● ☰ Log ☁ Download	Applied ❓ by applicant	[1] Winter 2025 teaching needs	[1] Winter 2025 teaching needs Evaluation not yet provided
☐ **Schamberger, Granville** ●●● ☰ Log ☁ Download	Applied ❓ by applicant	[1] Winter 2025 teaching needs	[1] Winter 2025 teaching needs Evaluation not yet provided
☐ **Ebert, Linwood** ⚖ ●●● ☰ Log ☁ Download	Applied ❓ by applicant	[1] Winter 2025 teaching needs	[1] Winter 2025 teaching needs Evaluation not yet provided
☐ **Reynolds, Carletta** ⚖ ●●● ☰ Log ☁ Download	Applied ❓ by applicant	[1] Winter 2025 teaching needs	[1] Winter 2025 teaching needs Evaluation not yet provided
☐ Leuschke, Curtis ⚖	Applied ❓	[1] Winter 2025 teaching needs	[1] Winter 2025 teaching needs

Managing Applicants within a Batch Round

Batch Round Completion

- Batch rounds are marked "complete" once a Search Report associated with that batch is approved

Creating a new Batch Round

- Applicant statuses before "Proposed Candidates" are reset to "Applied"

- Must review/consider these applicants anew in the new batch round, unless they have been permanently deselected during the prior batch

New Batch Round

- Now appears as Current batch round in listing:

Name	Review windows ⇵2	Additional information	Search report	Applications	Status
[2] Prof. Smith lab	Nov 20, 2024 Nov 24, 2024 hidden from applicants Nov 25, 2024	Specialist in underwater and above water basket weaving		View applications	Current
[1] Winter 2025 teaching needs	Nov 20, 2024	Need instructors for CS 061 and 161.	📄 Lehner W25 CS161	View applications	Completed

Found 2 matches

Only one active batch round at a time

- Note: you cannot create a new batch round if a current one exists that has not been "completed" yet

Applicants in next review window picked up:

Applicants from previous batch persist:

Managing Applicants in next Batch Round

- Candidate from Batch 1 and Batch 2:

Disposition reasons

Round 2: Prof. Smith lab   + Add

Round 1: Winter 2025 teaching needs
Duplicates or significantly overlaps existing area of strength in department/school/college

Disposition reasons

Round 2: Prof. Smith lab   Edit
Lacks sufficient research achievement/potential

Round 1: Winter 2025 teaching needs
Duplicates or significantly overlaps existing area of strength in department/school/college

- Candidate from Batch 2 only:

Disposition reasons

Round 2: Prof. Smith lab   + Add

Disposition reasons

Round 2: Prof. Smith lab   Edit
Interview showed some deficiencies
Specialization or area of expertise for position or department needs shows some deficiencies

SB 791 and AB 810 – effective Jan 1, 2025

(and a reminder about SB 1162)

SB 791

- Finalists/potential new employees must disclose if they are:
    - Subject to any final admin or judicial decisions within the last 7 years, determining that they committed any misconduct,
    - are currently being investigated for misconduct, or
    - have filed an appeal with a previous employer.

- Misconduct is:
    - any violation of the policies or laws governing conduct at the applicant's previous place of employment, including, but not limited to, violations of policies or laws prohibiting sexual harassment, sexual assault, or other forms of harassment, discrimination, dishonesty, or unethical conduct, as defined by the employer.

AB 810

- Finalist must sign release form authorizing the release, to UCSB, of information by their previous employers concerning any allegations of misconduct.

- UC uses signed release form to make reasonable attempt to obtain more information from previous employer

- Who does it apply to?
    - Any finalist/potential appointee who disclosed any misconduct from SB 791 disclosure requirement
    - ALL Senate faculty finalists/potential appointees, regardless of disclosure outcome

How does this affect recruitments?

- New language will be added to the "About UCSB" section for recruitments published on/after Jan 1, 2025:

ABOUT UC SANTA BARBARA

The University of California is an Equal Opportunity/Affirmative Action Employer. All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, national origin, disability, age or protected veteran status. For the University of California's Affirmative Action Policy please visit: https://policy.ucop.edu/doc/4010393/PPSM-20. For the University of California's Anti-Discrimination Policy, please visit: https://policy.ucop.edu/doc/1001004/Anti-Discrimination.

As a condition of employment, you will be required to comply with the University of California Policy on Vaccination Programs, as may be amended or revised from time to time. Federal, state, or local public health directives may impose additional requirements.

As a condition of employment, the finalist will be required to disclose if they are subject to any final administrative or judicial decisions within the last seven years determining that they committed any misconduct, are currently being investigated for misconduct, left a position during an investigation for alleged misconduct, or have filed an appeal with a previous employer.

- "Misconduct" means any violation of the policies or laws governing conduct at the applicant's previous place of employment, including, but not limited to, violations of policies or laws prohibiting sexual harassment, sexual assault, or other forms of harassment or discrimination, dishonesty or unethical conduct, as defined by the employer.
- UC Sexual Violence and Sexual Harassment Policy
- UC Anti-Discrimination Policy for Employees, students and third parties
- APM - 035: Affirmative Action and Nondiscrimination in Employment

How does this affect recruitments?

- Disclosure (and former employer release/follow-up, if applicable) must be done *before* formal appointment offer is issued
  - Disclosure process is straightforward, but previous employer follow-up may delay appointment timeline
- Ideally, this should be arranged at the time of the soft offer/search report/search waiver submission
- More details on exact procedure will be forthcoming

SB 1162 – Language Simplified!

- No need to reference salary scales or mention off-scale

- Simply list the salary range, e.g.
  - A reasonable estimate for this position at 100% time is $X - $Y

- Remember this means you CANNOT offer less than $X or more than $Y to your finalist

- Short ads/outreach must also contain the salary range
  - Abbreviated version, e.g. "$85K-$110K" is okay if needed to save space

- https://ap.ucsb.edu/resources.for.department.analysts/content/UCSB.Implementation.AB.168.and.SB.1162.pdf

Regular Workshops- please attend

- Search Plan Training for Staff
  - Late summer

- Applicant Management Training for Staff
  - Fall quarter

- **Search Plan Training for Search Committees**
  - Once per quarter (Fall, Winter Spring)
    - Winter 2025: 1/31/25
    - Spring 2025: 4/9/25
  - Multiple times during the summer– encourage your search committees!

- General Recruitments Workshop
  - As needed

QUESTIONS?