Search Plans in UC Recruit

SEPTEMBER 7, 2023
Search Plan Process

- Verify: Position authorized
- Prepare: Gather information
- Configure: In UC Recruit
- Submit: Search Plan for approval
- Wait: For final approval
- Publish: Recruitment live, Place ads
Verify: Is the Position Authorized?

• Senate Faculty Searches
  • Does dept have an FTE allocation and permission to search?

• Non-Senate Searches
  • Does position exist? Is there funding for it?
  • Non-instructional, non-startup state-funded positions require Hiring Exception Form
    • [https://ap.ucsb.edu/forms/academic.employee.hiring.exception.form.docx](https://ap.ucsb.edu/forms/academic.employee.hiring.exception.form.docx)
Prepare: Gather Information

• Work with Search Committee 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: In UC Recruit

Recruitments → Create New Recruitment Plan

- **Name**: 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
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
- Diversity
- Advertisements – where you will place your ads
- Selection Process – how you will arrive at a finalist
- Committee – members of the search committee
The Search Plan, in depth
Details

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.

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, as approved by the EVC’s office

Search areas, as approved by the EVC’s office

Not visible to applicants.

For more information, please refer to the details above.
A note on review windows

• No more Initial Review Date (IRD) or Open/Close/Final (OCF) search types

• All searches are designated “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
  • 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 as needed
  • If initial pool is not robust enough (conduct additional outreach/advertising)
  • If additional needs arise (for pooled recruitments)
**Position**

<table>
<thead>
<tr>
<th>Position details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Job location</strong></td>
</tr>
<tr>
<td><strong>Salary range</strong></td>
</tr>
<tr>
<td><strong>Anticipated start</strong></td>
</tr>
<tr>
<td><strong>Review timeline</strong></td>
</tr>
<tr>
<td><strong>Position duration</strong></td>
</tr>
<tr>
<td><strong>Percent time</strong></td>
</tr>
<tr>
<td><strong>Rank/Step</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Title information</th>
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</thead>
<tbody>
<tr>
<td><strong>Title code</strong></td>
</tr>
<tr>
<td><strong>Senate level</strong></td>
</tr>
<tr>
<td><strong>Availability cohort</strong></td>
</tr>
<tr>
<td><strong>Position title</strong></td>
</tr>
</tbody>
</table>

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

- May have ramifications for Add’l Qualifications
- Best practice: include “or later” when applicable, e.g.
  - “May 1, 2024 or later”
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. “$55,000 -- $87,000 annually”
  - Must be included in your 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 budget, scope of job responsibilities, 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](https://ap.ucsb.edu/resources.for.department.analysts/content/UCSB.Implementation.AB.168.and.SB.1162.pdf)
Description

The department is especially interested in candidates who can contribute to the diversity and excellence of the academic community through research, teaching, and service as appropriate to the position.

Standard text

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

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 status, protected veteran status, or any other characteristic protected by law.

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.
Requirements: References

• Setup options:
  • Letters of Recommendation
    • Applicants must provide name and contact info for references, and trigger the solicitation for letters in UC Recruit, before their application is considered complete
  • Contact Information Only
    • Applicants must provide name and contact info for references. No letters are solicited.
    • Search committee decides when (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
  • Make sure search committee is 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 short list 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
Requirements: Documents

- Starting with recommended settings populates a pre-determined list:
Reminders about Documents

• You are not required to keep the recommended settings!
  • Delete the ones you do not need (e.g. Research Statement for Lecturer search)
  • Add slots for the ones you do want
• Add descriptions to the documents for further context
• Toggle the “Required” and “Optional” designation
• Re-order the list so that all Required documents are listed before Optional documents
• Statements of Contribution to Diversity:
  • Required for Senate searches
  • *Must* be Optional for non-Senate, *if* you choose to keep this document slot
Qualifications

<table>
<thead>
<tr>
<th>Basic</th>
<th>Additional</th>
<th>Preferred</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Objective</td>
<td>• Also required</td>
<td>• Desirable but not required</td>
</tr>
<tr>
<td>• Non-comparative</td>
<td>• Must be met by start date</td>
<td></td>
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<tr>
<td>• Relevant to position</td>
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<td></td>
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<tr>
<td>• Verifiable through application materials</td>
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<tr>
<td>alone</td>
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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.
Why are Qualifications important?

### Basic

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

- OFCCP Internet Applicant is an individual who:
  - Submits interest via internet or other electronic means
  - Is considered by the contractor (UCSB)
  - Has the *Basic Qualifications* for the position
  - Does not withdraw from consideration
Qualifications

**Basic qualifications** (required at time of application)

- 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)

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

**Preferred qualifications**

- Not yet provided
Diversity

- Availability Demographics
  - Based on Fields of Study

- Affirmative Action Goals
  - Add Campus Availability & Placement Goals
  - Based on title and level:
    - https://eodp.ucsb.edu/equal-opportunity-and-affirmative-action/academic-recruitment-tools
Advertisements

• Planned Search & Recruitment Efforts
  • Description of planned advertisement and outreach efforts in order to reach a broad and inclusive applicant pool, particularly groups underserved per the Affirmative Action Plan

• Ad Sources
  • Listing of sources where you plan to advertise

• Note: Job Elephant no longer provides ad quotes, therefore uploading the quote is no longer required in this section
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
Selection Process: Selection Plan

• Road map the search committee expects to follow to arrive at a finalist
• Should include steps committee will take, metrics 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

**CORE COMMITTEE**

- **Committee Chair**
  - Can see submitted, on-time applicants; can manage applicants; cannot create or edit recruitments or run reports

- **Faculty Editor**
  - Same access as Committee Chair

- **Reviewers**
  - Read-only access to applicants who have applied; cannot manage applicant files

Department Analysts have access to see all applicants, Applied or Draft, on time or after deadline. Search Chairs, Faculty Editors, Reviewers have access to view non-hidden Applied applicants up to the latest Review Date.
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
• Await feedback and respond to/resolve Change Requests from approvers
• Upon final approval, Publish the Search Plan and place your ads
  • If search plan is approved before planned Open Date, you may push the Open Date up so applicants can apply immediately
• Wait for applicants to apply
  • 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
  • They will be locked from making further edits to their application after submission
Other Search Types
Multi-Level Searches

• Recruiting for multiple ranks, e.g. open rank (Asst, Assoc, Full), or tenured (Assoc, Full)
  • Senate searches: FTE approved @ more than one rank
  • Research titles: contact Joanna first!
• 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

Assistant Professor

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
Position title: Assistant Professor

Associate or Full Professor

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
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

<table>
<thead>
<tr>
<th>Reference type</th>
<th>Assistant Professor</th>
<th>Associate or Full Professor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Letters of recommendation</td>
<td>3 required; 2 optional (5 total)</td>
<td>Contact information only</td>
</tr>
</tbody>
</table>

**Reference process explanation**

- **Assistant Professor**: 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.

- **Associate or Full Professor**: 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
Questions?

(Reminder: Applicant Management Workshop– Tue, Oct 31 @ 9:00am)