Agenda

• Overview of UC Recruit
  • System overview
  • Resources & where to go for help

• Search Plan Process
  • 6 steps
  • Configuring your search plan in the system
  • How to get your search plans approved more quickly
As a public institution and federal contractor, UC is required to have in place a comprehensive protocol for maintaining recruitment records and establishing standards regarding all steps of the recruiting and selection process.

Improved reporting functionality means more granularity ➔ Repeat entries across different fields in UC Recruit.

UC Recruit is the system of record for academic recruitments.
Overview: UC Recruit

- System programming changes every 2 weeks
- User interface changes
  - Campus users
    - e.g. Request Changes
- What worked in past years won’t necessarily work going forward
Overview: UC Recruit resources for campus users

Production site: https://recruit.ap.ucsb.edu/
Training site: https://recruit.ap.ucsb.edu/training

System Resources:
  System-wide: https://recruit.ap.ucsb.edu/analyst/help
  Local: https://ap.ucsb.edu/resources.for.department.analysts/recruit/

Policy Resources include Red Binder section VII
Your Academic Personnel & College Analysts

Or you can always contact help@aait.ucsb.edu
Overview: Search Plan process

Verify → Prepare → Configure → Submit → Wait → Publish
VERIFY Is the position is authorized?

Senate faculty searches

Does the department have an FTE allocation and permission to search?

❖ Consider position data sheet – check with OISS

Non-Senate searches

Does a position exist; is there funding for it?

Non-instructional, state funded ➔ Hiring Exception Form
PREPARE gather information

Use System Resources & Search Plan Worksheets in
Resources for Department 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 (form) (rev. 6/27/2019)
      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
Recruitments > Create a new recruitment plan

1. Name
   • This is the name of the recruitment plan and what applicants will see when they apply
   • Job title, area of specialization, department

2. Home Department

3. Accept Applicants?

<table>
<thead>
<tr>
<th>Accept applicants?</th>
<th>Accept online applicants</th>
<th>Diversity survey only</th>
</tr>
</thead>
</table>

Create recruitment plan

JPF
SEARCH INFO

- Details
- Requirements
- Diversity > Placement Goals
- Advertisements
- Qualifications
- Selection Process
- Committee
- Documentation
- Disposition Reasons
**Details**

- Applicants cannot apply to the recruitment because its dates have yet to be set.
- https://recruit.ap.ucsb.edu:48908/JPF00606 (Preview)
- Not submitted for approval

**General information**

- Job #: JPF00606
- Department: Physics/College of Letters & Science - Mathematical, Life, and Physical Sciences
- Breadth: Missing
- Initial allocation: Missing

**Dates**

- Format: Missing

**Title information**

- Title codes: Missing
- Senate level: Not yet provided
- Availability cohort: Not yet provided

**Contact information**

- Mailing address: Missing
- Faculty/Staff contact: June R. Betancourt
- Public contact: June R. Betancourt
- Help contact: Help

**Description**

- Missing

**SEARCH INFO**

- Details
CONFIGURE in UC RECRUIT

Leave Blank:
- Salary Range
- Rank/Step

Critical:
- Salary Control number
- Approved Search Area

SEARCH INFO

- Details

- Salary Range
- Rank/Step
- Search name
- Salary control # (senate)
- Approved search area
- Dept
- Search breadth
- Job location
- Initial Search Allocation

• = all searches
• = senate searches only
Salary Control # is the FTE identifier, examples:
  • ECON20A
  • MLPS21

Approved search area examples:
  • Environmental Economics
  • Neuroscience
  • Open area

CONFIGURE in UC RECRUIT

SEARCH INFO
• Details

Salary control # (senate)
Approved search area

= senate searches only
**CONFIGURE in UC RECRUIT**

- Dept (snail) Mail Address
- Info URL (optional)
- Faculty and staff contact name
  - This name and email address are used by analysts, the search committee and the system to contact you about this recruitment. It is not visible to applicants.
- Public contact name
  - This is the Applicants and References contact name and email address used when UC Santa Barbara Academic Recruitment sends an email to:
    - References, thanking them for their submitted letter
    - Applicants, when their application is manually created and/or activated
    - Applicants, to remind them to complete the diversity survey
- Help contact email
  - Applicant questions asked using the "Contact us" form will be sent here

* = all searches
• **Description** = the ad on UC Recruit
  • Any alternate ad versions?
  • Visa/Work authorization?

• Follow RB VII-7
  • **Basic Elements of an Advertisement**
    • Dept, effective date, JPF number, level, specialization or area, qualifications, submission requirements, deadline, diversity statement & tagline
  • **Multi-level searches should provide applicant instructions**
CONFIGURE in UC RECRUIT

- **Title information**
  - Enter title(s) being searched

  ![Title information form]

- **Multi-level option:** *Make this recruitment multi-level*

SEARCH INFO

- **Details**

  ![Search info]

  - = all searches
CONFIGURE in UC RECRUIT

- Multi-level searches
  - Senate searches only
  - FTE more than one rank
  - Allows different document and reference requirements for each level

- Basic Qualifications **DO NOT VARY between levels**

- Applicants select level at which to apply
  - Appointment level determined by candidate’s qualifications; subject to review/approval by appropriate control points
• Pooled searches
  • Unit 18 lecturer searches – renew annually ✓
  • Research titles “catch-all” – pooled not advisable ✓
    • Position (qualifications, job duties, dates) should be defined
  • Basic Qualifications
    • Assessed ONLY ONCE
  • Applicant management is challenging, especially at Search Report stage
Application Submission Dates:

- Open/Close/Final
- Review Date \((IRD/Open \text{ Until Filled})\)
- Min 14 days non-senate; 30 days senate

\(~95\%\text{ of all searches are IRD/Open Until Filled}\)

\(\text{pooled & Senate searches almost exclusively use IRD}\)
CONFIGURE Open/Close/Final example

Example: Open 9/15/20 – Close 10/15/20 – Final 10/15/20

Open/Close Final: One-time searches; complete when the spot is filled
- All applications are received before any are reviewed
- Applications are visible to the search committee as soon as they are Complete
  - Open date = applicants begin applying
  - Close date = new applicants are no longer accepted
  - Final date = applicants can no longer modify or add to their application materials

Final Date 10/15/20

Complete applicants reviewed
Example: **Open** 9/1/20 – **IRD** 10/1/20 – **Add’l** 11/15/20 – **Final** 4/30/21

**Primary Consideration (IRD)** applicants

Review completed applications from 9/1/20 up to and including 10/1/20

**Add’l Review Date** 11/15/20

Primary Consideration (IRD) applicants **AND** completed applicants on or before 11/15/20

Applications started or completed outside of a review window are not reviewed

**Final Date** 4/30/21

**Applicants who complete after initial review window are able to apply until the final date, but can only be assessed and evaluated if another review date is added**
Application Submission Dates

1) How many IRDs can a search have?

2) The IRD is set as Nov 1, 2020. The Description says, “We will start reviewing applications on Nov 1, 2020.” Has the department correctly stated the deadline by which applicants should apply?

3) Does the "Final Date" mean the date by which the department needs to have finalized the recruitment and hired a candidate?
CONFIGURE in UC RECRUIT

SEARCH INFO

- Requirements

The system automatically generates these default applicant documents:

- Curriculum Vitae (required)
- Cover Letter
- Statement of Research
- Statement of Teaching
- Statement of Contr. to Diversity
- Misc/Additional

Multi-level will have two (or more) sets of Requirements
CONFIGURE in UC RECRUIT

- Use the Edit button, e.g. Misc/Additional may be changed to Sample Publications
- Document slots may be added or deleted if not appropriate to the position, e.g. Temporary Lecturer searches do not need a Statement of Research
- Add an optional description to guide applicants in submitting the appropriate materials, e.g. “Teaching Evaluations, if available”

Re-order the list, if desired, so that items are grouped logically
CONFIGURE in UC RECRUIT

SEARCH INFO

• Requirements

“This list shows applicants what they need to do to apply. The application requirements are locked because an applicant has already applied. You may still add optional documents, but cannot change the requirements to apply.”

Please! consult with AP before adding documents after search plan approval.
References – 3 options:

1) None – letters will not be collected in UC Recruit

2) Only Contact Info – applicant must provide name & contact info

3) Letters of Recommendation – applicant must provide name, contact info, and trigger solicitation
**CONFIGURE** in UC RECRUIT

- Fields of Study – customize availability pools for each recruitment – helps evaluate diversity of the applicant pool
- Select one or as many fields of study as are appropriate
- Check for placement goals (link)

**SEARCH INFO**

- Diversity

### Availability data

<table>
<thead>
<tr>
<th>Field of study</th>
<th>Male</th>
<th>Female</th>
<th>African American</th>
<th>Hispanic</th>
<th>Asian</th>
<th>Native American</th>
<th>Minority Total</th>
<th>White</th>
</tr>
</thead>
<tbody>
<tr>
<td>Campus: Anthropology, cultural</td>
<td>34.0%</td>
<td>66.0%</td>
<td>7.7%</td>
<td>9.6%</td>
<td>9.6%</td>
<td>2.6%</td>
<td>29.5%</td>
<td>68.8%</td>
</tr>
<tr>
<td>Campus: Anthropology, physical and biological</td>
<td>32.6%</td>
<td>67.4%</td>
<td>1.6%</td>
<td>7.8%</td>
<td>0.8%</td>
<td>1.6%</td>
<td>11.6%</td>
<td>86.8%</td>
</tr>
<tr>
<td>Campus: Developmental and child psychology</td>
<td>15.9%</td>
<td>84.1%</td>
<td>6.2%</td>
<td>8.4%</td>
<td>9.3%</td>
<td>1.0%</td>
<td>24.9%</td>
<td>74.1%</td>
</tr>
</tbody>
</table>
**CONFIGURE** in *UC RECRUIT*

**SEARCH INFO**

- **Advertisements**
  - What are the Planned efforts?
  - List advertising venues, listservs, etc.
    - Advertising outlets & JobElephant should be contacted *prior* to search plan submission
    - Alternate versions of ads (e.g. short ads)
  - Applicant Search Sources – UC Recruit is *not* an ad source
  - HERC is N/A – leave blank
  - *Suggested Ad Sources to Reach Underrepresented and Minority Groups* (list from EODP)
    - Available on AP Resources for Dept Analysts > UC Recruit page
CONFIGURE in UC RECRUIT

SEARCH INFO
• Qualifications

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

**Additional**
- Also required
- Must be met by start date

**Preferred**
- Desirable but not required
**OFCCP Internet Applicant Rule** – 4 criteria

An Applicant is an individual who:

1. Submits interest via internet or other electronic means
2. Is considered by the contractor
3. Has the Basic Qualifications for the position
4. Does not withdraw from consideration

**Basic**
- Objective
- Non-comparative
- Relevant to position
- Verifiable through application materials alone
PhD in modern Chinese literature, film, cultural studies, or related field required by time of appointment.

The minimum requirement to be considered an applicant is the completion of all requirements for a PhD (or equivalent degree) in modern Chinese literature, film, cultural studies, or related field except the dissertation (or equivalent) at the time of application.
**Basic Qualifications**: The minimum requirement to be considered an applicant is the completion of all requirements for a PhD in modern Chinese literature, film, cultural studies, or related field (or equivalent degree) except the dissertation (or equivalent) at the time of application.

**Additional Qualifications**: PhD degree in modern Chinese literature, film, cultural studies, or related field by time of appointment as Assistant Professor.

**Preferred Qualifications**: PhD in Modern Chinese literature, film, cultural studies, or related field.
Basic Qualifications: Applicants must have a PhD (or equivalent) in biology, ecology, or a related field.

A perfectly valid Basic Qualification.

Complete, on-time applicants must be assessed against the requirement as written.

Does the Applicant have the Required Degree as of the Time of Application?
Pooled recruitments: “...by appointment start date” is not a viable Basic Qualification

If positions become available over time, “by time of appointment” does not work. Applicants are assessed against Basic Qualifications only once within a recruitment, and only if they are complete within a review window.

Define the basic qualification required as of the time the applicant submits a completed application
**SEARCH INFO**

- **Selection Process**

- **Selection Criteria** – what criteria will the search committee use to assess applicants?
  - These should reflect Qualifications & Requirements

- **Selection Plan** – what is the “road map” the search committee will follow in order to arrive at a finalist? Describe applicant screening & evaluation protocols, voting procedures, etc.
  - How will interviews be conducted? Will there be a long shortlist and then a shortlist? When will letters be collected in Only Contact Info?

- **Specializations** – optional, but can be useful in sorting applicants
  - e.g. pooled lecturer search in Earth Science
    - Earth Systems, Biogeology, Geochemistry, Geology, Geophysics, Paleobiology

Do these make sense in the context of the rest of the recruitment?
• Selection Plan: example of a pooled lecturer search
  • did not pass search plan review

All applications, whether complete or not? What about review dates? References? What happens after interviews?
CONFIGURE in UC RECRUIT

SEARCH INFO
• Committee

- Committee Chair
  Can see completed, 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 are complete; cannot manage applicant files

Department Analysts have access to see all applicants, Complete or Not Complete, on time or after deadline. Search Chairs, Faculty Editors, Reviewers have access to view non-hidden Complete applicants up to the latest Review Date.
SEARCH INFO

- Details
- Requirements
- Diversity > Placement Goals
- Advertisements
- Qualifications
- Selection Process
- Committee
- Documentation
- Disposition Reasons
CONFIGURE in UC RECRUIT

SEARCH INFO

- Documentation
- Disposition Reasons

**Documentation**
- Any add’l documents approvers should see

**Disposition Reasons**
- Explain the basis for the deselection of a candidate
- May be suppressed
- Up to 5 customized reasons; must be approved
SUBMIT for review & approval

System Checklist:

Using the checklist does not ensure that all campus required fields are completed.
SUBMIT for review & approval

Workflow Preview:

- Review the approval workflow.
- If missing or it looks wrong, contact help@aait.ucsb.edu or AP.
Once Draft Recruitment Plan is ready, click *Submit It for Approval* to initiate the review and approval process.

Complete any missing items indicated by an orange dot, and confirm submission.
WAIT for review & approval

Search plans can be approved more quickly by:

1) Fully reading feedback from approvers
2) Responding quickly to Change Requests
3) Updating ALL areas affected
4) Resolve the Change Request to alert the approver
Once **all** approvers have reviewed and approved the plan, the department:

- changes open date, if appropriate
- publishes to the jobs board
- initiates advertising/outreach as per the plan

Is it possible to make changes to the recruitment once the Search Plan has been approved and published?

*It depends...*
Questions?