Search Plans

August 2018
Agenda

• Introductions
  • Central office personnel
  • UC Recruit

• Overview
  • 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
Introductions

• Academic Personnel & AAIT team

• Equal Opportunity & Discrimination Prevention Office

• UC Recruit system
Overview: UC Recruit  

- System programming changes every 2 weeks

- User interface changes
  - e.g. recruitment creation “wizard” going away

- What worked last year won’t necessarily work this year
Overview: UC Recruit system-wide functionality

The UC, as a public institution and federal contractor, 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 resources

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/

Or you can always contact help@aait.ucsb.edu

Policy Resources include Red Binder, section VII, and your AP & College analysts
Overview: Search Plan process

1. **VERIFY** that position is authorized
2. **PREPARE** gather information
3. **CONFIGURE** in UC RECRUIT
4. **SUBMIT** Search Plan for approval
5. **WAIT** for approval by **all** approvers
6. **PUBLISH** recruitment after **final** approval and place any advertising as per the plan
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?
PREPARE gather information

Use System Resources & Search Plan Worksheet 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.
  - UCSB Resources:
    - Search Plan - Worksheet (form) (rev. 7/31/2018)
      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.
    - Search Plan - Worksheet (non-form) (rev. 7/31/2018)
      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

**Leave Blank:**
- Salary Range
- Rank/Step

**Optional:**
- Information URL

- = all searches
- = senate searches only
Search Name:
Job title, area of specialization, department

Department

Search Breadth:
Open, Specialized/targeted, Don’t know

Initial Search Allocation

Job Location (defaults to SB)
CONFIGURE in UC RECRUIT

Application Submission Dates:

- Open/Close/Final
- IRD/Open Until Filled
- Min 14 days non-senate; 30 days senate

~90% of all searches are IRD/Open Until Filled

pooled & Senate searches almost exclusively use IRD

IRD = Initial Review Date

= all searches
CONFIGURE Open/Close/Final example

Example: Open 9/15/18 – Close 10/15/18 – Final 10/15/18

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
**Configure Initial Review Date Example**

**Example:** *Open 8/6/18 – IRD 10/1/18 – Add’l 11/15/18 – Final 6/30/19*

- **Open 8/6/18 ➔ IRD 10/1/18**
  - Primary Consideration (IRD)
  - Review completed applications from 8/6/18 up to and including 10/1/18

- **Add’l Review Date 11/15/18**
  - Primary Consideration (IRD) applicants
  - AND
  - completed applicants on or before 11/15/18

- **Final Date 6/30/19**
  - Applications started or completed outside of a review window are not reviewed

*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.*
Initial Review Date example

**Open date:** August 6, 2018
**IRD:** October 1, 2018
**Final:** June 30, 2019

Is this optimal? Does the dept expect to keep looking at apps in May & June?

What about Dec 31 as a final date?
Application Submission Dates

1) How many IRDs can a search have?

2) The IRD is set as October 1, 2018. The Description says, “We will start reviewing applications on October 1, 2018.” Has the department clearly identified 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?
Salary Range Control # is the FTE identifier, e.g.:
- ECON16A
- MLPS19
- COMS18B

Approved search area:
- Environmental Economics
- Neuroscience
- Open area
CONFIGURE in UC RECRUIT

• Description = the ad on UC Recruit
  • alternate ad versions?

• Follow RB VII-7
  • Basic Elements of an Advertisement
    • Dept, effective date, job # or JPF, level, specialization or area, qualifications, submission requirements, deadline, diversity statement & tagline
CONFIGURE in UC RECRUIT

- **Title Codes**
  - e.g. Temp lecturer 1632, 1630, 1550

- **Fields of Study**
  - Select one or more to generate availability data to help evaluate diversity of the applicant pool
CONFIGURE in UC RECRUIT

• Contact Info
  • Contact for Faculty & Staff
    • Auto populates with dept analyst name
  • Dept Mail Address

As of Aug 2018

Click

Save & done then

Configure for online applicant management

= all searches
**Configure** in UC RECRUIT

**SEARCH INFO**

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

**Search Info**

- Requirements

The system automatically generates these default applicant documents:

- Curriculum Vitae (req’d)
- Cover Letter
- Statement of Research
- Statement of Teaching
- Statement of Contr. to Diversity
- Misc/Additional
CONFIGURE in UC RECRUIT

• Use the *Edit* button, e.g. *Curriculum Vitae* may be changed to *Resume*
• 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*”

SEARCH INFO

• Requirements

Re-order the list so that items are grouped logically
“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.
**Configure in UC Recruit**

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

**Search Info**

- Requirements
**CONFIGURE** in **UC RECRUIT**

- Customize availability pools for each recruitment
- Select at least one or as many fields of study as are appropriate
- Check for **placement goals** (link)
- See **fields of study** (link) *Ctrl/click* from Diversity tab within each recruitment, or:

  https://oeosh.ucsb.edu/eodp/equal.opportunity.and.affirmative.action/academic.recruitment.tools/uc_recruit.fields.of.study.pdf

**SEARCH INFO**

- **Diversity**
• What are the Planned efforts?
• List advertising venues, listservs, etc.
  • JobElephant should be contacted prior to search plan submission
  • Alternate versions of ads (e.g. short ads)?
• Ad sources – input one at a time
  • 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**

<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>Description = The Ad</td>
</tr>
<tr>
<td>• Relevant to position</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Verifiable through application materials alone</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**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

<table>
<thead>
<tr>
<th>Basic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Objective</td>
</tr>
<tr>
<td>Non-comparative</td>
</tr>
<tr>
<td>Relevant to position</td>
</tr>
<tr>
<td>Verifiable through application materials alone</td>
</tr>
</tbody>
</table>
PhD in modern Chinese literature, film, cultural studies, or related field by time of appointment

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.
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.
Within the Description (the ad):
start date of position shows 7/1/19
"PhD preferred. 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."
**Pooled recruitments:** “...by appointment start date” is not recommended for use with 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**
**at the time the applicant submits**
**a complete application**
• **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 campus interviews?
**Search Info**

- Committee

**Core Committee**

- Committee Chair
  - Same access as dept analyst, but can’t create or edit recruitments or run reports

- Faculty Editor
  - Same access as Committee Chair, serves Equity Advisor for search

- Reviewers
  - View applicants who are complete; cannot manage applicant files

Department Analysts, Search Chairs, and Faculty Editors (Equity Advisors) have access to see all applicants, Complete or Not Complete. Search committee Reviewers have access to view non-hidden Complete applicants up to the latest Review Date.
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
Once Draft Recruitment Plan is ready, click **Submit It for Approval** to initiate the review and approval process.

Review the **approval workflow**, complete any missing items indicated by an orange dot, and confirm submission.

If this is not the correct workflow, please contact **Support**.
System Checklist:
Convenient!?...
...or misleading?

Using the checklist (as of 8/8/18) does not ensure that all campus required fields are completed.
How long does search plan approval take?

228 search plans approved in 2017-18

- 39% (88) approved in 14 days or less; of those, 19% (44) were approved in 9 days or less
- 9% (20) approved in 60 days or more
WAIT for review & approval

Search plans can be approved more quickly by:

1) Fully reading feedback from approvers
2) Responding quickly
3) Updating ALL areas affected
4) Letting the approver know when to resume review
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?