

UC Berkeley, Office for Faculty Equity and Welfare

Search Guide for **Non-Senate Recruitments:** Policies, Procedures and Practices

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Introduction and Purpose

The purpose of this guide is to provide relevant information and procedures for faculty and staff to conduct effective and equitable searches for non-senate academic employees. The guide is organized broadly by information and tasks necessary to create a Search Plan prior to launching a search, to evaluate candidates during the search, and to complete the Search Report once a candidate (or candidates) has been selected.

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The University of California uses the system-wide online applicant tracking system [AP Recruit](#), developed and maintained at UC Irvine, to support the academic recruitment process. For information on how to use the AP Recruit system see the AP Recruit User Guide (available at <http://ofew.berkeley.edu> in the Academic Recruitment tab), which is updated regularly.

This Search Guide, along with the AP Recruit online system supports the University of California in fulfilling our academic interest in the pursuit of excellence and the legal requirement of non-discrimination under federal and state laws. The commitment to diversity and equal opportunity recognizes that a diverse academic employee workforce enhances our academic mission of teaching, research, and service. The University also recognizes that a diverse workforce is essential for maintaining legitimacy as a public university dedicated to serving the needs of our increasingly diverse state.

Summary of Overall Requirements and Timelines for Non-Senate Academic Recruitment

This section provides an outline of the overall academic recruitment tasks, including creating a Search Plan prior to launching a search, evaluating applicants during the search, and completing a Search Report once a candidate (or candidates) has been selected to put forward for appointment consideration. The subsequent sections provide more detail and rationale for each of the tasks in the bulleted lists below. In AP Recruit you will find the locations where the information described in this Search Guide is entered. The AP Recruit User Manual provides information specifically on the logistics of navigating the AP Recruit system.

Creating the Search Plan and Launching the Recruitment

Approximate timeline: Allow approximately two – three weeks for creation and approval of the Search Plan and advertisement(s).

- Prepare a Search Plan, which includes the advertisement.
- Receive all required approvals, including the Office for Faculty Equity & Welfare (OFEW) as the final approver.
- Publish the recruitment upon approval.

Outreach

Timeline: Allow a minimum of 15 calendar days for advertisement and outreach (a longer period of time is necessary if a broad and inclusive pool is not achieved).

- The recruitment is automatically posted in a number of online locations. All recruitments must be posted for a minimum of 15 days; pools may be open for up to two years, with an Initial Review Date at least 15 days after the recruitment opens.
- All advertisements must state open until filled.
- It is necessary to conduct active outreach for a broad and inclusive pool of applicants by using additional advertisement locations and making personal contacts (at least two relevant discipline-specific outreach activities).
- Determine whether individuals who submitted an application by the deadline date meet the basic qualifications necessary to be considered an applicant, as stated in the advertisement. Assign disposition reasons (deselection) for individuals who did not meet the basic qualifications.
- Evaluate the applicant pool for size, depth, and diversity after a minimum of 15 calendar days. If needed, extend the recruitment period for at least another 15 days. It is not necessary to submit the applicant pool for review and approval in AP Recruit.

Evaluating Applicants

Approximate timeline: Allow approximately two – six weeks to evaluate applicants and conduct interviews.

- Fully evaluate all applicants for the position using objective criteria and established evaluation mechanisms (for pools, consider only applicants who applied by the review date and have expertise in the area under consideration).
- Provide disposition reasons for applicants who do not move forward for further consideration. It is not necessary to submit a short list for review and approval in AP Recruit.
- Keep applicant statuses up-to-date.
- Conduct interviews with at least two candidates and select a final candidate(s).

Completing the Search Report

Approximate timeline: Allow approximately two weeks for creation and approval of the Search Report.

- Begin the Search Report as soon as possible (e.g., evidence of advertising and outreach activities can be uploaded, disposition reasons can be given to some candidates early in the search process, all candidate statuses should be kept up-to-date throughout the recruitment).
- Submit the Search Report to OFEW through AP Recruit **prior** to making an official offer of employment to the candidate(s). Candidates can be told they are being recommended for appointment to the position. The status for the final candidate should be “Proposed Candidate.”
- For pools, a Search Report is needed when a candidate or candidates are put forward for potential hire. Multiple candidates can be included in a single Search Report when being put forward at the same time as part of the same pool. When another candidate is selected from the pool at a later time, a new Search Report must be put forward.

Final Closing Instructions for Searches – Applicant Statuses

- Return to AP Recruit when an outcome for the recruitment is known – formal campus offer given, formal offer accepted, formal offer declined, candidate was hired, or not – and update the applicant statuses.
- Select a final outcome of the search.
- Make the recruitment “inactive” in AP Recruit.

Overview for Creating the Search Plan

1. Create the Search Plan in AP Recruit. Sections include:

- Basic information about the recruitment
- Diversity benchmarks and goals
- Applicant qualifications
- Planned search and recruitment efforts
- Advertisement
- Selection process
- Search committee
- Additional search plan documents
- Disposition reasons
- Application requirements

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2. When all fields are complete in the Search Plan click “Submit Plan for Approval.” All approvers log into AP Recruit to review and approve the Search Plan (OFEW is the final approver). Once approved, “publish” the recruitment.

3. OFEW publishes the recruitment to AP Recruit and posts the approved advertisement on the Higher Education Recruitment Consortium (HERC), Higher Ed Jobs, The Chronicle of Higher Education, and America’s Job Exchange (includes multiple diversity locations). Other discipline-specific advertising locations are required (at least one), and are determined by the search committee.

Creating the Search Plan: Basic Information about the Recruitment

The purpose of this section is to describe the information about the recruitment that you need to enter in AP Recruit. This information is used to set up the search, collect data for reporting purposes, and determine national availability data by gender and race/ethnicity for the recruitment area.

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Recruitment name

Use the following format:

“Job Title – Area of specialization if applicable – Department/school/college.”

For example:

- Lecturer Pool – Composition – College Writing Programs
- Lecturer – Nuclear Engineering – College of Engineering
- Academic Coordinator II – Executive Director – Henry Wheeler Center for Emerging and Neglected Diseases
- Postdoctoral Scholar – Semiconductor Nanocrystals – Chemical and Biomolecular Engineering
- Assistant Project Scientist – Center for Effective Global Action

It is necessary to follow this format for consistency because the title appears on the Recruit website, which is then “scraped” automatically for posting to other online locations.

Description

LEAVE THIS FIELD BLANK

OFEW will place the advertisement here (removing information about application requirements that will otherwise be redundant in AP Recruit). AP Recruit will display the advertisement as listed in the Description field on the AP Recruit apply page.

Approved search area

Leave this field blank for non-senate recruitments.

Department

If the position needs to be cross-listed in more than one department please contact OFEW.

Academic year

The year in which the search is being conducted.

Salary control number

DO NOT USE THIS FIELD FOR NON-SENATE RECRUITMENTS (this is the FTE authorization number given by the EVCP office for senate faculty searches)

Application submission dates

For all recruitments, applications are considered “complete” in AP Recruit when all required materials are uploaded and letters of reference have been requested through the system (if required), even if the reference letters have not arrived. It is not necessary to allow a longer window of time specifically for letters of reference (however, if the advertisement states that letters are required, a candidate will need to provide them, ideally before selection to the shortlist. A candidate cannot be put forward as the Proposed Candidate without the required letters).

All non-senate recruitments use the Initial Review Date/Open Until Filled (“IRD”) search option.

The “**open date**” is the date on which the search goes live. The “**initial review date**” marks the closing of the first pool of applicants. The search committee reviewers can see every application completed before this date. “**Additional review dates**” can be assigned if the initial applicant pool does not yield a candidate. If the Committee does not wish to advertise the next review date to applicants it can be made “private.” The “**final date**” is the last date for individuals to apply for the position.

Key features of IRD recruitments:

- **The open date and all review dates cannot be changed once they have passed.**
- Applications that are complete and submitted before a review date cannot be modified by the applicant once that review date has passed. Additionally, if the analyst exchanges a document on behalf of an applicant (such as an updated CV), the applicant will be bumped out of the review period in which the application was completed, and considered “complete” on the day the new documents are uploaded.
- Search committee reviewers can only view applications that were completed before a specified review date (**the search committee chair sees all applications, but should not review those completed after a review date**).
- Applicants can apply before the final date, even if there is no upcoming public review date. In this case, they will be informed with a message when they apply that their application will not be considered if the position has already been filled.

Search breadth

Identify if the search is in an open/general area or specific (e.g., History lecturer versus lecturer of Native American History).

Initial search allocation

Indicate if the search is newly allocated or relisted following a failed search in the past.

Title codes that are applicable for the position

Select the type of position, for example, lecturer, specialist, academic coordinator. You can find all title codes online in the AP Recruit Help area, or alternatively, begin typing the name of the job position and select from the list. **Important: Select all applicable title codes! Once the search is launched the title codes cannot be changed and new ones cannot be added. Proposed candidates can only be hired into a title code approved as part of the search plan.**

Salary range and rank/step

Enter the salary range that will appear in the advertisement, and the possible ranks and steps (if applicable) for the position. Be sure that the salary range matches the proposed position title codes, and ranks and steps.

Specialties

Up to five specialties may be selected to most closely represent the search area. These areas are used to determine the national availability pool for the recruitment (more information is available in the Diversity Benchmarks and Goals section).

Recruitment contact information

Specify the HR analyst who will serve as the contact person for applicant and referee questions. A department email address can be used for this purpose if desired.

Creating the Search Plan: Diversity Benchmarks and Goals

Specialties and national benchmark data

Prior to beginning the search, the Search Committee, faculty Principal Investigator, and/or AP analyst should review the pool of U.S. degree recipients by race/ethnicity, gender, veteran's status, and disability status that is specific to the specialty area(s) for the particular recruitment. These data are automatically provided in AP Recruit in the Diversity tab, based on the specialty areas specified in the Basic Recruitment section, and represent the broad benchmarking goals for the recruitment. The applicant pool should be compared to these data regularly during the application period to evaluate the search and recruitment outreach efforts.

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Affirmative action goals

As a federal contractor, UC Berkeley must establish and maintain an Affirmative Action Program and a yearly written [Affirmative Action Plan \("AAP"\)](#), and fulfill requirements established by the Federal Department of Labor, [Office for Federal Contractor Compliance Programs \("OFCCP"\)](#) to provide equal employment opportunity and nondiscrimination. The UC Berkeley AAP provides yearly data on groups that are underutilized on the Berkeley campus by job type and by schools and colleges. Underutilization is defined as having fewer minorities, women, individuals with disabilities, or protected veterans¹ in a particular job group than would reasonably be expected given their availability in the job market.

The Affirmative Action goals for searches reflect this underutilization. We set our annual percentage goals equal to availability for all underutilized job groups and must make good faith efforts to recruit a broad and inclusive pool of qualified applicants. Affirmative action goals have been established where underutilization has been identified using the "any difference rule." UC Berkeley's goals are directed to achieve a level of gender and ethnic representation equal to availability in all job groups.

The tables linked to in AP Recruit are taken from the UC Berkeley AAP, divided by job types and Schools/Colleges. A shaded cell denotes underutilization of a group. Refer to [the table](#) and then check the boxes next to the groups that are underutilized on the Berkeley campus in the relevant job group.

Please note that AP Recruit invites all individuals applying for non-senate academic positions to voluntarily self-identify their gender, race/ethnicity, disability status, and status as a protected veteran. The OFCCP requires that we ask individuals to self-identify, but individuals may choose not to reveal this information without any negative repercussions.

It is important to be informed about and know the distinction between Federal Affirmative Action requirements and California Proposition 209.

¹ A protected veteran is defined as a disabled veteran, a recently separated veteran, an armed forces service medal veteran, or a veteran who served on active duty in the U.S. military during a war, or in a campaign or expedition for which a campaign badge was authorized under the laws administered by the Department of Defense.

California Proposition 209

In 1996 the voters of California passed Proposition 209, now part of the California State Constitution ([Article 1, §31\(a\)](#)) which prohibits discrimination against or preferential treatment to “any individual or group on the basis of race, sex, color, ethnicity, or national origin in the operation of public employment, education or contracting.” It does not, however, prohibit actions necessary to establish or maintain eligibility for any federal program, where ineligibility would result in loss of federal funds to the University. Therefore, UC Berkeley is obligated to take affirmative action to ensure equal opportunity in employment, but we may not set aside positions for specific groups.

The prohibition against discrimination described in Proposition 209 is consistent with [University policy](#) prohibiting discrimination in employment on the bases of race, color, national origin, religion, sex, gender identity, pregnancy, physical or mental disability, medical condition (cancer-related or genetic characteristics), ancestry, marital status, age, sexual orientation, citizenship, or status as a covered veteran. The prohibition against discrimination supports the University’s commitment to address the barriers that face under-represented groups in academic careers and to serve the needs of our diverse state.

Federal Affirmative Action Requirements vs. California Proposition 209

- **Affirmative Action** relates to [recruitment](#). Federal regulations require collection of gender/ethnicity/disability/veteran status data along with good faith efforts to obtain a broad and inclusive candidate pool.
- **Proposition 209** relates to [selection](#). State law prohibits both discrimination against or preferential treatment to a group on the basis of race, sex, color, ethnicity, or national origin.
- DO diversify the applicant pool. DO NOT extend preferences.

Related policies and guidelines:

[Office for Federal Contractor Compliance Programs](#)
[Section 503 of the Rehabilitation Act](#)
[Vietnam Era Veterans’ Readjustment Assistance Act](#)

Creating the Search Plan: Applicant Qualifications

The [OFCCP requires](#) that **basic/minimum requirements** be established and listed for all academic positions. These requirements must be met **at the time of application** and are necessary for consideration as an applicant for the position. The requirements are the minimum threshold for applicants.

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Each individual who applies for an academic position will be considered “unknown” until assessed by the Analyst or Chair for meeting the requirements. The assessment will move the individual to the “qualified” or “unqualified” group. Only those individuals who meet the basic qualifications will be considered applicants according to the federal government. **Individuals with *incomplete* applications should remain in the “unknown” category and should not be assessed for the basic qualifications.**

It is best practice to review applicants for the basic qualifications as soon as they apply because they cannot be considered further if they do not.

Basic, additional and preferred qualifications are those that are:

- **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., a Doctoral or equivalent degree in Molecular Biology or a related field, but not “a technical degree from a good school”)
- **Relevant** to the performance of the particular position
- **Verifiable** by evidence or statements in the applicant’s submitted materials

Additional qualifications are requirements that **must be met by the start date of the position**. **Preferred qualifications** are those that are preferred but not required.

For many positions an appropriate basic qualification is a PhD or equivalent degree by the application deadline date. However, some positions allow for the fact that many applicants will be working on the doctorate at the time they apply for the job, with the intention of receiving it prior to the start date.

There is no set recommendation to make about a “safe” minimum degree or type of expertise that will work in all cases for the basic qualifications. In some disciplines a Master’s degree is achieved during a doctoral program and could be appropriate, but not in others. For some positions a Bachelor’s degree is a satisfactory minimum threshold. In many cases an appropriate basic qualification could be, “The minimum qualification required to be considered an applicant for the position is the completion of all Ph.D. degree requirements except the dissertation at the time of application.”

Finding the “sweet spot” for application requirements to create a pool that has the desired depth and breadth.

It is important to carefully consider the application requirements for a particular position. Some requirements may inadvertently leave out individuals who would have been excellent candidates, while others may

be so inclusive as to encourage an unwieldy number of applicants who meet the stated qualifications but are not above the bar for Berkeley standards. Examples include:

Narrow

- Requiring a PhD or equivalent degree at the time of application when many desired applicants will be working on their dissertation at the time they apply.
- Creating more application requirements than are necessary to carefully evaluate each candidate.
- Requiring materials that an individual at a certain career stage would not be likely to provide or that would require significant effort to provide.

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Wide

- Requiring only a Master's or equivalent degree at the time of application for a position where a PhD is clearly needed for the job.
- Specifying the job field more widely than intended so that individuals apply who will clearly not meet the goals of the search. For example, if the search is for a postdoctoral scholar in a field where a high level of very specialized skills are required, but the advertisement is worded to appear as if the area of focus is more broad, the applicant pool may consist of many people who are qualified to be postdoctoral scholars at Berkeley, but not to work on the specific project.

Sample additional qualifications that are problematic:

- Excellent oral and written communication skills
- Strong presentation skills
- Good interpersonal skills
- Excellent analytical, organizational and problem solving skills

Terms such as "excellent, strong and good" cannot be objectively evaluated. Instead units can use other objective terms like "demonstrated."

Sample additional qualifications that are objective, noncomparable, relevant, and verifiable (assessed either through submitted materials or during interview):

- Demonstrated oral and written communication skills
- Evidence of presentation skills (e.g., experience giving talks at conferences)
- Demonstrated interpersonal skills
- Analytical, organizational and problem solving skills

Creating the Search Plan: Planned Search and Recruitment Efforts

As a federal contractor, UC Berkeley is obligated by law to make efforts to encourage underrepresented individuals to apply for academic positions, with the goal of meeting the benchmarks for the search area and affirmative action goals for the recruitment. The goal of every search should be to ensure there are outstanding women and minority candidates in the pool. To support these efforts, OFEW automatically posts advertisements in a number of online venues (see below for a list).

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Outreach activities to increase the number of qualified candidates, including women and underrepresented minority candidates may include:

- Making personal calls or emails to colleagues to identify potential underrepresented applicants;
- Expanding the usual list of contact departments and schools to a broader range of institutions, including [Historically Black Colleges](#) and [Hispanic serving institutions](#);
- [Reviewing Doctoral and Postdoctoral directories, including the President's Postdoctoral Fellowship Program](#);
- Considering candidates who may be currently under-placed and excelling at less well-ranked institutions;
- Attending conferences that provide opportunities to recruit a diverse pool of applicants and include contacts with organizations serving underrepresented groups in the field;
- Approaching and/or interviewing underrepresented candidates at professional meetings or conferences and encouraging them to submit an application;
- Searching for individuals with non-traditional career paths who may have taken time off for family reasons (e.g., to provide care to children, a disabled family member, or parent) or who have achieved excellence in careers outside academe (e.g., in professional or industry service);
- Ensuring that the recruitment and application process is accessible to individuals with disabilities. All advertisements include contact information for individuals who have questions or concerns; candidates who are unable to use AP Recruit should be encouraged to submit the required materials through another venue (email, mail). Consult the [Disability Compliance Office](#) for more information on accommodating individuals with disabilities for interviews or campus visits.

Discipline-Specific Outreach

In addition to outreach for underrepresented groups, for all searches **it is necessary to engage in a minimum of two additional discipline-specific outreach efforts**. Discipline-specific locations should be specific to the field in which the work will be conducted to solicit candidates with the requisite skills for the job. Job boards and other locations where the ad will be posted must be active, with many recent postings. Additionally, these locations should not be oriented toward particular underrepresented groups unless they are in addition to the required minimum of two discipline-specific outreach efforts. The table below lists the acceptable forms of discipline-specific outreach. To meet the minimum requirement for discipline-specific outreach efforts, **please choose one outreach effort from each column**.

Outreach Effort #1: Choose at least one	Outreach Effort #2: Choose at least one
Post the advertisement on a discipline-specific website (paid or free)	Post the advertisement on a discipline-specific website (paid or free)
Post to an active discipline-specific listserv not affiliated with UCB	Post to an active discipline-specific listserv not affiliated with UCB
Conduct personal outreach via email to a minimum of five people in that discipline, not affiliated with UCB	
Post to a minimum of five (non UCB) discipline-specific university job boards	

Example

Discipline-specific locations for non-senate position in Statistics: Job Boards at the National Institute of Statistical Sciences and Institute of Mathematical Statistics.

Additional locations to reach underrepresented groups: Committee on Women in Statistics and Women in Probability group.

Creating the Search Plan: Advertisement

Advertisement documents

A carefully drafted and complete advertisement is an important component of a broad and inclusive search. The language in the advertisement serves as a broad description of the job position, the criteria that will be used to evaluate candidates, and the requirements to apply. A strong advertisement sets a positive tone for the entire search process.

Only advertisements that have been approved as part of the Search Plan may be posted or published (including “long ads” and “short ads”). Any proposed modifications of approved advertisements must be resubmitted to OFEW via email (ofew@berkeley.edu) for approval prior to posting or publication. Additionally, if it is necessary to extend the deadline, proposals to re-advertise the position must be resubmitted for approval to OFEW via email and uploaded to AP Recruit.

The required elements of advertisements are based on ensuring that the University meets its obligations as a federal contractor, meets additional requirements of the Federal Department of Labor, follows University of California policies, and uses best practices for reaching a broad and inclusive pool.

See Appendices for the following resources:

- [Appendix A: Advertisement Requirements Checklist](#)
- [Appendix B: Advertisement templates for non-senate recruitments](#)
- [Appendix C: Minimum requirements for “short ads”](#)

Upload all advertisements relevant to the recruitment (for example, a long or a short ad) into AP Recruit. In the comments section indicate which advertisement is intended to be posted on AP Recruit and the Higher Education Recruitment Consortium (HERC) by naming that advertisement “Ad for UCB and HERC.”

Diversity Recommendations for Advertisement Text

Family Responsive Ad Language

Statement that Berkeley has an excellent benefits package and a number of policies and programs in place to support employees as they balance work and family.

Diversity Ad Language

Statement of departmental or school commitment to diversity that makes clear that contributions to diversity and equal opportunity are valued in the selection process:

- “The department seeks candidates whose research or teaching has prepared them to contribute to our commitment to diversity and inclusion in higher education.”
- “The school/department is interested in candidates who will contribute to diversity and equal opportunity in higher education through their teaching or research.”
- “The school/department is interested in candidates who have an understanding of the barriers facing women and people of color in higher education.”
- “The school/department is interested in candidates who have a record of success advising individuals from groups underrepresented in higher education.”
- “The school/department is interested in candidates who will bring to their research the perspective that comes from a non-traditional educational background or understanding of the experiences of those under-represented in higher education.”
- “The school/department is interested in candidates who have research interests in subjects that will contribute to the understanding of diversity and equal opportunity.”

Posting and publishing advertisements

All advertisements for academic recruitments are automatically posted to the following locations:

- [AP Recruit](#)
- [Northern California Higher Education Recruitment Consortium \(Norcal HERC\)](#)
- [Higher Ed Jobs](#)
- [The Chronicle of Higher Education](#)
- [America's Job Exchange \(AJE\)](#)
- [AJE Veterans Exchange](#)
- [AJE Disability Exchange](#)
- [AJE State Exchange for California](#)
- [Job Opportunities for Disabled American Veterans \(JOFDAV\)](#)
- [Disabled Person](#)
- [Diversity Working](#)
- [Hero 2 Hired](#)
- [Indeed](#)
- [Simply Hired](#)
- [Beyond](#)
- [The California State Workforce Site \(CalJobs\)](#)
- Bay Area Career One Stop Center Representatives
- Community Outreach Organizations

Central posting of academic job advertisements to these locations meets the University’s OFCCP diversity outreach compliance requirements. However, committees must also use discipline-specific locations and are strongly encouraged to post job advertisements on websites, listservs, and blogs that serve a diverse audience within the specific field or specialization (for example, Science, Nature, the

Modern Languages Association, the Society for the Advancement of Chicanos and Native Americans in Science, social science listservs, Association for Women in Science, National Society of Black Engineers, etc.).

Support for posting job advertisements in additional locations through Job Elephant

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Job Elephant (<http://jobelephant.com>) is available to assist with most advertising, at no additional cost from the normal posting fees. The Berkeley campus representative is Michael Ang (michael@jobelephant.com).

You can work directly with Job Elephant to place the job advertisement in any additional locations to those posted automatically by OFEW (see above). Job Elephant posts the advertisement and provides a single invoice of exactly the charge from the journal or online site. This saves the extra work of paying invoices to each location. Job Elephant can also suggest other potential locations where ads in the relevant field are typically successful, and, most importantly, will provide data at the end of the recruitment on how many times the ad was viewed at each location and how many times individuals clicked on the link to AP Recruit to apply. This will allow departments to maximize recruitment efforts and dollars in future recruitments.

Prior to submitting the search plan and advertisement to the Office for Faculty Equity & Welfare

Contact Job Elephant (Michael@jobelephant.com) with information regarding the search. You can send a list of places where you want to post the ad. Be sure to include the link and/or full name of the journal, organization, or publication and specify if you are requesting an online posting, print ad, or both.

Job Elephant will also provide a list and the cost of additional niche sites and/or publications that have performed well for your particular job for your consideration. They will help you finalize the list of locations for placing your advertisement. For more information, please visit <http://jobstats.com>.

After the search plan and advertisement have been approved by campus

Email the approved job advertisement as a Word document to michael@jobelephant.com. Job Elephant will only bold the job title and the 'apply to' link (when applicable). There will be no italicizing, underlining, etc. Please include a chart-string in your email (if applicable), and contact information for sending the invoice, including name, phone number, and email address.

With the above information Job Elephant will email back the following for your review

Job Elephant will send you a listing of all the sites/publications, start date and pricing, and a copy of the text that will be used in the posting/print ads.

Job Elephant will use a shortened URL called apptrkr.com in place of your "apply to" URL, which is approved by the Office for Faculty Equity & Welfare. [Apptrkr.com](http://apptrkr.com) will redirect job seekers to your requested page where they can apply and at the same time allow Job Elephant to collect response rate data for each of your ads so they can better track the response rate. For more information, please visit <http://jobstats.com>.

HERC category

Select the category that most closely aligns with the recruitment area. This will inform how the position is posted on the [Higher Education Recruitment Consortium \(HERC\)](#).

Ad sources

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If using advertising locations in addition to those that the University supports centrally, provide all locations where the advertisement will be published, posted, or distributed. Evidence of all advertising and outreach is required in the Search Report at the end of the recruitment.

Creating the Search Plan: Selection Process

Selection criteria

It is best practice with non-senate searches to provide a description of the selection criteria to be used in evaluating the candidates, but this is not required.

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Although you do not need to submit the criteria for review, it is important to determine evaluation and selection criteria prior to beginning the search in order to equitably evaluate all applicants. These criteria should be job related and taken from the position description. Choose selection criteria that can be consistently applied to all candidates, and consider quantifying the evaluations with a ranking system. The [Candidate Evaluation Form in Appendix D](#) can be used as a template from which to create the criteria.

Selection plan

It is best practice with non-senate searches to provide a description of the selection plan to be used in evaluating the candidates, but this is not required.

Although you do not need to submit the selection plan for review, it is important to have a selection plan to evaluate the applicants and choose the proposed candidate. The selection plan should include the screening process, interview procedures, voting procedures (if relevant), etc. If using a search committee, ensure that all members agree on how the evaluation and selection criteria should be interpreted and how they relate to the goals for the search. For example, the search committee should discuss:

- The qualifications that an applicant must demonstrate in order to be considered for the position
- The specific attributes or dimensions along which qualified applicants will be distinguished
- The evidence the committee members will look for to determine if applicants have met the criteria

Do's and don'ts for selection criteria and evaluation

- The search committee should rely on **evidence** in the discussion of candidates' qualifications. Statements about candidates should be supported by materials in the application or from the interview.
- The search committee should not use criteria that are difficult to defend with evidence. Be able to explain your decision for rejecting or retaining a candidate based on evidence in the candidate's file that follows agreed upon evaluation criteria.
- Review the evaluation of candidates at each stage of the search to be sure that the criteria are applied uniformly.

- Do not use years of experience since Ph.D., or anything age-related as a criterion. If the criterion is experience or education in a specific, recently developed sub-discipline, state the criterion in terms of the sub-discipline, not years since degree.
- Do not require uninterrupted periods of employment, as this may adversely affect women in their childbearing years and persons with medical conditions or disabilities.
- Do not use demographic characteristics to describe why a candidate either would or would not be a good fit for a position. For example, rather than stating that a candidate would be a good role model for graduate students because he is African American, focus on the candidate's contributions to diversity through research or service activities.

The role of contributions that promote diversity and equal opportunity

The University of California Academic Personnel Manual ([APM 210-d](#)) states that search committees should consider contributions to diversity in their evaluation of candidates for faculty positions at Berkeley.

The University of California is committed to excellence and equity in every facet of its mission. Teaching, research, professional and public service contributions that promote diversity and equal opportunity are to be encouraged and given recognition in the evaluation of the candidate's qualifications. These contributions to diversity and equal opportunity can take a variety of forms including efforts to advance equitable access to education, public service that addresses the needs of California's diverse population, or research in a scholar's area of expertise that highlights inequalities.

The ideal way to evaluate contributions to diversity is to require applicants for academic positions to provide a statement regarding their past or potential future contributions as part of their application in AP Recruit. This allows search committees to have clear information to evaluate, rather than having to guess or rely on applicants' other materials. It also communicates to applicants the University's commitment to hiring academic employees who will best serve the needs of our diverse student body and public institution. AP Recruit has a default "Contributions to Diversity" application requirement, set as "optional." To require the statement of all applicants set the document to "required" when creating the application requirements, and include the requirement in the advertisement.

Creating the Search Plan: Search Committee

Search Committee Composition and Size

Searches for non-senate academic employees vary greatly in the extent to which a formal search committee is used versus relying on a single individual, such as a faculty Principal Investigator, to conduct a search. This is a recommended guide for the most common non-senate titles:

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Type of Appointment	Reviewer(s)
Lecturers	A single faculty member of a committee, depending on the needs of the department
Academic Coordinators, Continuing Educators, Librarians, and Coordinators of Public Programs	Typically a search committee
Specialists/Project Scientists	Typically a faculty Principal Investigator. For research centers or units a committee is often used.
Researchers	Either a faculty Principal Investigator or a search committee
Extension	Typically the HR Manager
Postdoctoral Scholars	Typically a faculty Principal Investigator. For research units a committee is often used.

Committee/analyst roles

Core committee

The search committee may consist of as many members as is necessary. One person may serve in the role of Search Committee Chair. The Chair can review incomplete applications and may manage applicant files if desired. Search committee reviewers have viewing rights to completed applications for a given recruitment and may comment on them and flag applicants.

For recruitments conducted by a single faculty member and supported by an HR analyst that are IRD/open until filled, it is recommended that the faculty member have the status of search committee reviewer rather than chair. This makes the review process more streamlined and clear for the faculty member, particularly when conducting searches with multiple review periods.

Equity advisor/Equity Advisor role

Non-senate recruitments do not involve an Equity Advisor.

Additional reviewers

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The designation as “additional reviewer” is typically used to allow individuals not on the search committee to view applicant information. An entire department can be granted reviewer status to view the finalists in a search if necessary, though this is typically not done for non-senate recruitments. To assign a non-Berkeley affiliate access as a search committee member see [Appendix E](#) for instructions. A complete description of user roles and access rights is provided in the AP Recruit User Manual. **Please note: It is not necessary for analysts to have “additional reviewer” roles - all analysts with access to searches in a particular department automatically have analyst access to the search.**

Guidelines for Search Committees

Each department or school should establish its own procedure for appointing a search committee, depending on the needs of the department and the job type, while taking into account the way that committees have been established in the past. Some non-senate searches do not involve an established search committee.

Select a chair of the search committee

One member of the search committee should serve as the chair. This individual has unique responsibilities to the search ([see next page for more information on this role](#)).

Appoint a diverse committee

The search committee should include members with a demonstrated commitment to increasing equity and access in higher education. Whenever possible, the search committee should represent a diverse cross section of individuals, including men and women, and majority and minority group members. Research has shown that a diverse search committee is more likely to yield a robust candidate pool.

Avoid conflicts of interest on the search committee

It is important to avoid potential conflicts of interest when selecting members of the search committee and also when confronted with situations with individual applicants. After the committee has been established, set forth a consistent protocol for handling difficult situations of a real or perceived conflict of interest. These include when a student collaborator, former student, friend or close colleague, or someone related to a committee member applies for the position. Ideally these situations can be anticipated ahead of time and the affected individual can choose not to sit on the particular search committee. In other cases, it is appropriate for the committee member to disclose the relevant information and recuse himself or herself from committee deliberations about the individual. Please consult with OFEW (642-1935) to discuss difficult situations.

Prepare for the search

Adequate preparation is also important to an effective search. All search committee members should read this guide prior to commencing the search process to be aware of best practices and of their responsibilities. Department analysts serve as a resource to faculty, many of whom are not regularly involved in conducting academic recruitments.

Confidentiality

Confidentiality preserves the integrity of the selection process and protects the privacy of the candidates. All members of a search committee, including students and individuals outside the department or school, have access to confidential search information on a “need to know” basis. All members of the search committee with access to search records are ethically bound to the utmost level of confidentiality. Specifics of the committee deliberations should not be discussed with anyone outside the search committee, with the exception of the department chair, dean of the school, or OFEW. The requirement for confidentiality extends to all aspects of the search, including written and verbal communications, and through all phases of the search process. Discourage discussions about candidates that do not focus on the established criteria for the position. Demographic characteristics, family status, spousal/partner issues, or other non-job related information or rumors should not enter into deliberations about the candidates.

How to Avoid Having Active Recruitment Efforts Backfire

Women and minority candidates wish to be evaluated for academic positions on the basis of their scholarly credentials. They will not appreciate subtle or overt indications that they are being valued on other characteristics, such as their gender or race, which is also illegal. It is important that contacts with women and minority candidates focus on their skills and credentials as stated in the job advertisement.

Review Research on Bias and Assumptions

Regardless of the social groups we belong to, we all perceive people differently based on their demographic characteristics (race/ethnicity, gender, sexual orientation, gender identity, disability, religion, politics, etc.). *However, and importantly, most people try to overcome their stereotypic preconceptions.* Understanding the nature of such biases and implicit assumptions may reduce the impact of irrelevant factors in the candidate selection process. Therefore, time should be spent educating search committee members about research on unconscious bias and cognitive errors in selection processes. See [Appendix F, “Countering Selection Bias,”](#) for more information. There is also a ready-to-print handout, “Research on Bias,” prepared by the UCLA Faculty Diversity and Development office on their [Department Chair Resources webpage](#).

Summary of the role of the search committee chair (when applicable)

For non-senate recruitments that involve a search committee, the chair has overall responsibility for managing a proactive, timely, fair and legal search. Responsibilities include:

Establish processes and ground rules before the search begins

- Discuss the overarching goals of the search.
- Ensure understanding and compliance with applicable laws and policies (Affirmative Action and Proposition 209).
- Create a plan for conducting the search, including how and when meetings will occur, how meetings will be conducted, and when and how topics of discussion will be raised.
- Instruct the committee on confidentiality requirements of candidates and the search process.
- Discuss any potential conflicts of interest that may arise, for example, individuals who may apply for the position who have relationships with search committee members, and how they will be handled.

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Lead the committee in all phases of its work

- Develop a job advertisement that reflects the goals of the search.
- Create a proactive recruitment plan to generate a broad and inclusive applicant pool, including soliciting suggestions from colleagues or organizations to identify qualified individuals who might not otherwise apply for the position.
- Establish written evaluation and selection criteria and ensure that the criteria are applied equitably throughout the search process.
- Ensure that each candidate's file is read by more than one search committee member at each stage of the search process.
- Discourage discussions about candidates that do not focus on the established selection criteria for the position.
- Determine the short list of finalists for the position.

Maintain positive interaction with candidates

- Ensure that the committee treats all candidates respectfully and equitably.
- Ensure that candidates feel welcomed — Berkeley's reputation as a welcoming institution rests in large part with the search committee members' treatment of candidates.
- Maintain communication with candidates, keeping them informed of the process and timelines.
- Inform applicants in a timely manner if they are no longer under consideration for a

position. AP Recruit can be used to send emails to applicants.

Put forward a candidate

- Guide the search committee in voting procedures.
- Write the Search Committee Narrative (not required for lecturer, postdoctoral fellow, specialist, continuing educator, or project scientist recruitments).

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Conduct post-search committee review

- Prepare and submit the Search Report for review and approval prior to moving forward in the process of a formal offer of employment.

Creating the Search Plan: Additional Search Plan Documents

There is a section in AP Recruit to upload any additional materials for the search plan if relevant, for example, an organizational chart, or an [Academic Coordinator Questionnaire](#). These materials may be necessary for the Academic Personnel Office to verify the appropriate title, rank, and step for the recruitment position.

Creating the Search Plan: Disposition Reasons

One or more “dispositions,” or reasons for deselection of a candidate, are assigned to individuals who submitted an application for the position. One set of reasons are used for individuals deemed “unqualified” because they did not meet the **basic requirements** for the position as stated in the advertisement, did not provide a complete application, did not have the required letters of reference submitted on their behalf, or withdrew prior to being invited for an interview. Another set of disposition codes are used to assign a disposition reason for all applicants who met the basic qualifications.

In addition, the search committee has the ability to create up to five additional disposition reasons that relate to the specific search being conducted if the preselected list is not sufficient. Additional disposition reasons should be clearly related to the job and must be proposed and reviewed as part of the Search Plan (they cannot be added after the recruitment is published).

It is also possible to delete disposition reasons that do not apply to a particular recruitment. The deleted reasons will not appear for any candidates in the pool.

Disposition reasons for unqualified individuals (those who did not meet the basic qualifications):

- Application was incomplete, materials submitted were not the required materials
- Degree was not in the advertised field(s) if specific field(s) were required
- Did not meet stated basic clinical requirements
- Did not meet stated basic research requirements
- Did not meet stated basic service requirements
- Did not meet stated basic teaching requirements
- Did not meet stated basic years of experience required
- Did not possess basic degree requirements stated in advertisement
- Did not possess stated credentials (e.g., board eligibility/board certification)
- Candidate withdrew
- Other, please specify (if this is selected a comment must be included)

Disposition reasons for qualified applicants:

- Alternate for position
- Duplicates or significantly overlaps existing area of strength in department/school/college
- 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

- Publication record shows some deficiencies
- References were weak
- Specialization or area of expertise for position or department needs shows some deficiencies
- Interview showed some deficiencies
- Other, please specify (if this is selected a comment must be included)

Creating the Search Plan: Application Requirements

Requirements to apply for the job

The AP Recruit system requires the indication of which documents individuals must submit to be considered for the job, and which are optional. In AP Recruit a Curriculum Vitae is required as the default; other listed choices are optional. Optional documents can be removed, and additional items (optional or required) can be added. Provide a unique upload slot for **each document**. For example, if three publications are required, there should be three slots with labels such as Publication One, Publication Two, and Publication Three, rather than as “Three Publications.” Beware of requiring more information than is considered necessary to adequately evaluate the candidates adequately; an applicant with an incomplete application cannot be reviewed or hired for the position.

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Optional documents can be added after the recruitment opens, or even after the final date to apply, but the requirement documents may not change. It is common to ask for additional information from individuals on the short list. You can set up the new optional document in AP Recruit and email the candidates to provide the requested information.

The requirements stated in the job advertisement, and their corresponding descriptions, should be exactly the same as the stated requirements in AP Recruit. *Copy and paste from the advertisement into AP Recruit.*

Letters of Reference

Letters of reference are often an important part of recruitment for non-senate academic positions. Letters may be obtained by asking candidates to have referees submit letters directly through AP Recruit, or by asking candidates for referee contact information only (there is no obligation to contact references provided by candidates). Carefully consider the requirement for letters of reference because it cannot be changed once the recruitment is published and the first applicant applies.

Carefully choose the number of letters or contact information to request. It is common to provide a range (e.g., 3 - 5 or 2 - 4). Letters can only be received through AP Recruit or directly from the referee to the department analyst. Additional letters submitted on behalf of a candidate cannot be accepted ([see section on accepting and evaluating letters of reference for more information](#)).

Choose who will have access to the letters of reference. For non-senate recruitments letters are typically viewable to all reviewers.

If letters are requested as part of the application it is necessary for all letters to be received. AP Recruit will mark an application “complete” without letters (if they are requested by the candidate), but a candidate cannot be considered a proposed candidate without the required number of letters. The analyst has the option of sending an email reminder to applicants regarding missing letters of reference, but if a reminder is sent to one applicant it must be sent to all. Applicants can also re-request letters of reference from their referees even after

the final date to apply for the position. Consider including a statement in the advertisement about when letters of reference must be received for consideration for the position.

- Advantages: Candidates are clear about when the letters must be sent on their behalf, and a deadline for letters reduces the number of late letters
- Disadvantages: Some candidates will be less inclined to ensure that the letters are received by the application closing date, and a hard deadline would disqualify some individuals from further consideration.

Notice of policy on disclosure of evaluation letters

All potential referees must be given notice of the University of California policy on disclosure and confidentiality of academic personnel review files, including when the letters are provided via a third party such as a dossier service or career center. The link to the policy is: <http://apo.berkeley.edu/evalltr.html>. Referees who upload their letter into AP Recruit will receive the following notice through the system:

Although a candidate may request to see the contents of letters of evaluation in accordance with California law and University policy, your identity will be held in confidence. The material made available will exclude the letterhead, the signature block, and material below the signature block. Therefore, material that would identify you, particularly information about your relationship to the candidate, should be placed below the signature block. In any legal proceeding or other situation in which the source of confidential information is sought, the University does its utmost to protect the identity of such sources.

All advertisements for jobs where letters of reference may be sought must include the follow statement:

"All letters will be treated as confidential per University of California policy and California state law. Please refer potential referees, including when letters are provided via a third party (i.e., dossier service or career center), to the UC Berkeley statement of confidentiality (<http://apo.berkeley.edu/evalltr.html>) prior to submitting their letters."

Review and approval of the Search Plan

When the Search Plan is complete and ready for review, click the ‘Submit Plan for Approval’ button. The Recruitment will be in a “Draft” state, as shown by the badge on the Recruitments page, until it is “Published.” Click ‘View Approval Request’ to go to the Approval page.

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Download and review the proposed Search Plan. Edits can continue to be made as needed until the Search Plan receives final approval by OFEW. However, once OFEW starts review please do not make additional changes unless notifying the office first. Once approved, a final Search Plan is available as a PDF and serves as the permanent record of what was approved.

There is an approval chain for non-senate recruitments:

- **Search Committee Chair (can be the search committee chair, the faculty principal investigator, or the faculty member assigned to reviewing a lecturer pool)** – assign the correct name
- **Department Chair (or equivalent, often the Unit Director)** – assign the correct name(s)
- **Dean’s Analyst** – assign the correct name
- **Dean (and often a Dean’s delegate)** – assign the correct name(s)
- **Academic Personnel Office** – names are auto-populated (do not add an alternate name)
- **OFEW (“Diversity Office”)** – names are auto-populated (do not add an alternate name)

When the names have been entered, click done. An automatic email will be sent to the first approver within approximately 30 minutes, and will cc the department analyst. When each approver approves the plan an email will automatically be sent to the next reviewer in line.

There is an option to provide written comments regarding the Search Plan. The analyst and all approvers can view the comments and can make comments. Approvers can also be notified with a reminder via email on the Approvers page.

There is an Approvals Dashboard available (next to the Recruitments tab on the top banner), which will allow monitoring of the progress of approvals for the recruitments you have access to. It displays the current status of approvals, including who has approved and who is next for approval, and includes filters to make viewing the list of recruitments more streamlined. Notice the “change columns” button that will allow you to add more columns to the display.

When all approvals are received, an automatic email will be sent to the analyst indicating it is ready to publish. Push the “Publish” button to launch/open the recruitment.

Outreach

Conduct the outreach specified in the planned search and recruitment efforts as part of the Search Plan (see Planned Search and Recruitment Efforts section).

Evaluate the applicant pool broadly for size, depth, and diversity on an as-needed basis before the initial review date. This can be done in AP Recruit as often as desired, **but it is not necessary to submit the applicant pool for review and approval.**

If a minimum 15-day recruitment period has been selected it is necessary to evaluate the applicant pool immediately after 15 days. If the pool lacks the necessary breadth, depth, or diversity sought, another *public review date* must be established for at least 15 additional days, with additional outreach efforts taken.

Please note: A Search Report submitted for a position in which there was a single qualified applicant and only 15 days of outreach will be declined, and the search will need to be re-opened.

Evaluating Applicants: Overview of Activities During the Search

Assessment of basic qualifications

- Determine whether individuals who submitted an application by the initial review date meet the basic qualifications necessary to be considered an applicant as stated in the advertisement. Assign disposition reasons for those who do not meet the basic qualifications.

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Guidance for reviewing applicants in lecturer pools (or other recruitments that have an initial review date and are open until filled)

Applicant evaluation

- Support the search committee in their review of applicants and use of AP Recruit.
- Keep applicant statuses up-to-date throughout the evaluation period.
- Provide disposition reasons for applicants who do not move forward for further consideration.
- Review letters of reference or contact referees of finalists
- Conduct interviews with at least two candidates
- Select the proposed candidate(s) – analysts update the statuses and enter the Proposed Offer Information.
- Analysts upload all evidence of advertising and outreach.

Evaluating Applicants: Assessment of Basic Qualifications

The Office of Federal Contractor Compliance Programs (OFCCP), Department of Labor requires the assessment of **basic qualifications** for all academic positions. These requirements must be met **at the time of application** and are necessary for consideration as an applicant for the position.

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- Use the basic qualifications as stated in the advertisement to assess each individual who submits an application for the position by the Initial Review Date. It is recommended that each individual is assessed as soon as possible after they submit an application. **Do not** assess individuals who applied after the IRD. If necessary an additional review date can be created to make available additional applicants for consideration.
- For individuals who do not meet the basic qualifications, select one of the applicable disposition reasons ([see section on Disposition Reasons for the full list](#))
- Applicants who initially meet the basic qualifications but later withdraw prior to selection to “invite for interview” status or further will be indicated as not meeting the basic qualifications (“candidate withdrew”).

Review the applicant pool

To assess the value of outreach efforts review the demographic profile of the applicant pool now that it includes only individuals who met the basic qualifications, and compare it to the diversity benchmarks available in AP Recruit. A new public review date can easily be established if the pool is small and/or lacks diversity. However, it is not necessary to submit the applicant pool for review or approval in AP Recruit.

Please note: A Search Report submitted for a position in which there was a single qualified applicant and only 15 days of outreach will be declined, and the search will need to be re-opened.

Guidelines for Review of Lecturer pools

Review individuals who applied by the Initial Review Date (IRD) or additional review dates (as needed)

Individuals who applied after the IRD should remain in the “unknown” bucket in AP Recruit. If there is a need to review individuals who applied after the IRD date an additional "private" or "public" review date can be assigned, which will reveal additional applicants who applied by the new date. For example, a second review date might be November 1 to consider applicants for lecturer positions for the spring semester. All individuals who applied since the start of the search up to this new review date should be reviewed, with the exception of those who are unqualified or who have previously been deselected.

Review each individual for meeting (or not) the basic qualifications as established in the advertisement.

It is recommended that on a regular basis the analyst assess the basic qualifications of new applications by reviewing the CV in AP Recruit. Assign a disposition reason to individuals who do not meet the basic qualifications; they will remain in the "unqualified" bucket and should not be considered further.

Determine the specific course needs for a lecturer

When a need for a lecturer arises, it may be for a course that requires specific expertise and/or experience. Briefly scan the CVs of the applicants who met the basic qualifications (those "qualified") to learn whether they have stated experience in the needed area. This can also be done by the analyst if the area of need is straightforward. Only those applicants who have the required experience need to be fully considered.

If the area of need is known initially (at the outset of setting up the search pool) the analyst can do this scan as part of the review for basic qualifications, and use a flag in AP Recruit to indicate the area for those who have the qualifications (for example, "developmental psychology," or "ceramics.").

Deselect all other applicants with "Other," and state that their area of expertise was not considered for this position. If a future need arises requiring different expertise, these deselected individuals may be considered at that time. Using the flags feature in AP Recruit will make it easier to find applicants with particular areas of expertise.

Conduct a more careful review of the sub-pool of applicants

Interview at least two individuals by phone, Skype (or in-person if desired). Deselect the others with an applicable reason from the list of disposition reasons.

Keep the statuses of those being considered for the position up-to-date. If applicants are interviewed use the "interviewed" status. If they are selected, move their status to "Proposed Candidate." **Do not move any applicant beyond Proposed Candidate until after the search report is approved.**

Provide a sentence or two about the individuals who were interviewed but not selected in the Comments field next to the disposition reason. Be very specific about the area, course, or field the candidate was being interviewed for (e.g., American History, Middle East History, French History). Also provide a statement about why the proposed candidate is being selected for the position, but do not choose a disposition reason since they are not being deselected. The search Report can be submitted immediately when these tasks are finished. There is no requirement for a Search Committee Narrative.

For each lecturer pool Search Report the following information needs to be clear for every applicant:

- The semester or year of the specific hiring need (for example, for one semester – fall 2015, or both semesters – the 2015-16 academic year).
- The specific area or course the individual was considered for (e.g., Jazz, Chinese, U.S. History, Poverty in America, etc.).
- The individual's status at the time the Search Report is submitted:
 - **Permanent deselection** (minimally qualified, reviewed, deselected – will not be considered again). When this is used it only needs to be stated once.
 - **Wrong specialization** (minimally qualified, reviewed, incorrect specialization, deselected for current specific search area, will be reviewed again next time)
 - **Deselected for current need** (minimally qualified, reviewed, correct specialization, not selected for an interview, will be reviewed again next time)
 - **Interviewed** (minimally qualified, reviewed, interviewed, not proposed candidate, will be reviewed again next time)
 - **Proposed candidate** (minimally qualified, reviewed, interviewed, selected).

EXAMPLE**Round 1: Need for fall, 2015 in Jazz**

Candidate outcome for current need	Candidate status	Disposition reason(s)	Disposition reason/comment
Permanent deselection. Will not be hired	Complete	Select reason(s), or choose 'Other' and state the reason.	Fall, 2015 (Jazz): Reason provided if selected 'Other.' Will not be considered again.
Wrong specialization. Will consider again in the future.	Complete	'Other'	Fall, 2015 (Jazz): Wrong specialization, will consider again for future needs.
Deselected for current need: Right area but not selected.	Complete	Select reason(s), or choose 'Other' and state the reason.	Fall, 2015 (Jazz): Reason provided if selected 'Other.' Will consider again for future needs.
Considered and interviewed but not selected candidate.	Interviewed	Select the disposition reason(s).	Fall, 2015 (Jazz): Several sentences about why the person was interviewed but ultimately not selected for the position.
Proposed candidate	Proposed Candidate	NO DISPOSITION REASON	Fall, 2015 (Jazz): Several sentences about why this person is the proposed candidate for this particular need.

Round 2: Need for spring, 2016 in Music History

Candidate outcome for current need	Candidate status	Disposition reason	Disposition reason/comment
Permanent deselection. Will not be hired.	Complete	Select reason(s), or choose 'Other' and state the reason.	Only given to candidates who applied after the review dates for the last Search Report. Spring, 2016 (Music History): Reason provided if selected 'Other.' Will not be considered again.
Wrong specialization. Will consider again in the future	Complete	Disposition reason fall, 2015: Reason selected. Disposition reason spring, 2016: 'Other'	Fall, 2015 (Jazz): Correct area, not selected. Disposition reason provided. Will consider again for future needs. Spring, 2016 (Music History): Wrong specialization, will consider again for future needs.
Deselected for current need: Right area but not selected.	Complete	Disposition reason fall, 2015: 'Other' Disposition reason spring, 2016: Select reason(s), or choose 'Other' and state the reason.	Fall, 2015 (Jazz): Wrong specialization, will consider again for future needs. Spring, 2016 (Music History): Reason provided if selected 'Other.' Will consider again for future needs.
Considered and interviewed but not selected candidate.	Interviewed	Disposition reason fall, 2015: 'Other' Disposition reason spring, 2016: Select the disposition reason	Fall, 2015 (Jazz): Wrong specialization, will consider again for future needs. Spring, 2016 (Music History): Several sentences about why the person was interviewed but ultimately not selected for the position.
Proposed candidate	Proposed Candidate	NO DISPOSITION REASON	Fall, 2015 (Jazz): Wrong specialization, will consider again for future needs. Spring, 2016 (Music History): Several sentences about why this person is the proposed candidate for particular need.

How to assign the reasons in bulk (e.g., “Spring, 2015 [Music History]: Wrong specialization, will consider again for future needs”):

- Click on the names of the candidates who need the same comment
- Click “Edit comments for selected applicants”
- Type in the comment
- Select “Keep existing comments and append the new comment”

Applicant Evaluation

Confidentiality

Confidentiality preserves the integrity of the selection process and protects the privacy of the candidates. All members of a search committee, including students and individuals outside the department or school, have access to confidential search information on a “need to know” basis. All members of the search committee with access to search records are ethically bound to the utmost level of confidentiality. Specifics of the committee deliberations should not be discussed with anyone outside the search committee, with the exception of the department chair, dean of the school, or the Office for Faculty Equity & Welfare. The requirement for confidentiality extends to all aspects of the search, including written and verbal communications. Discourage discussions about candidates that do not focus on the established criteria for the position. Demographic characteristics, family status, spousal/partner issues, or other non-job related information or rumors should not enter into deliberations about the candidates.

Guidelines for applicant evaluation

- Review the written materials submitted for each candidate who meets the minimum qualifications, ensuring that sufficient time is spent on the initial review of each application to provide a thorough assessment. Rushing or spending too little time can increase the influence of unconscious biases.
- Each candidate’s file should be reviewed by more than one search committee member when a committee is used.
- Evaluate each candidate’s entire application using established selection criteria; don’t depend too heavily on only one element.
- Be careful not to subject women or minority candidates to different expectations. The work, ideas, and findings of women or minorities may be undervalued or unfairly attributed to a research director or collaborators despite contrary evidence in publications or letters of reference.
- Be careful not to make assumptions about possible family responsibilities and their effect on the candidate’s career path that would negatively influence evaluation of a candidate’s merit, despite evidence of productivity.
- A candidate may be selected for his/her track record in diversity-related research or working with diverse students, but State law prohibits use of characteristics of the individual (e.g., race, sex, color, ethnicity, disability, veteran status, or national origin) as a basis for selection. This constitutes preferential treatment.

- Candidates should not be selected based on University/college/graduate advisor's reputation. This is hard to justify as job-related, and it may discriminate by race or gender.

Provide disposition reasons for applicants who will not move forward for serious consideration

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Applicants who are reviewed and determined not to merit serious consideration or a campus visit should have at least one disposition reason assessed to them at that time ([refer to the section on disposition reasons for more information](#)).

Evaluating Applicants: Letters of reference

Letters of reference are often an important part of evaluating candidates for academic positions. The search committee is not obligated to contact the referees provided by the candidate, but if letters are requested of one short-listed candidate they should be requested of all.

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Please note: Reference writers have two ways to submit their letter in AP Recruit - by uploading the document as a PDF, and by copying and pasting the text of the letter directly into the provided text box. Letters pasted directly into the text box may lack typical identifying information available in letter head, and occasionally lack a signature line if the referee neglects to include it in the text box. These letters should be treated the same as letters uploaded as PDFs.

Unsolicited Letters

If an unsolicited letter from a referee arrives, it should not be reviewed by the faculty member or search committee unless there is a remaining slot for an additional letter in AP Recruit, and they plan to receive similar letters from all candidates (e.g., the committee requested 3 – 5 letters, the candidate listed three names and received three letters, and a fourth individual sends an unsolicited letter that can be uploaded into the system). If the committee/faculty member does plan to review an unsolicited letter, they should respond in writing to the referee, giving notice of the University of California policy on disclosure, and provide the letter writer with an opportunity to amend or withdraw the letter by a specified date. If the letter writer does not amend or withdraw the letter by the specified date, the letter may be provided to and considered by the search committee/faculty member.

If the letter is in addition to those required, it may not be considered in the review of the candidate (e.g., three letters are required and a fourth letter is emailed directly to the department). In this event, the letter writer should be thanked for the letter, and the candidate should be made aware of an extra letter and that this letter will not be considered. The name of the letter writer should not be disclosed to the candidate. The candidate may choose to change the names of the referees in AP Recruit if a letter for a referee has not arrived as long as it is before the application deadline.

Requests for search-related documents from applicants

All requests for search-related records by applicants should be forwarded to the Academic Personnel Office (appolicy@berkeley.edu). This office will redact the information as appropriate and provide a copy directly to the individual making the request.

Evaluating Applicants: Interviews

Interviews

Interviews can take place in person, by telephone, or by Skype. It is important to make every effort possible to interview all candidates in the same manner. This is sometimes not possible if one candidate is local and another is out of state. **It is not necessary to submit a short list for review and approval in AP Recruit.**

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Create a list of interview questions based on the job description and evaluation criteria to ask of all candidates interviewed.

Campus Visits

It is not necessary to have campus visits for non-senate recruitments; these are guidelines for use if relevant. Whether interviewing candidates at a national conference, or bringing candidates for a campus visit, remember that the candidate is also evaluating the department or school and the university. First impressions are important on both sides.

To ensure equity, provide each candidate with the same welcome and introduction to the department or school. For example, if one candidate is taken out to dinner, then all candidates should be taken out to dinner. Give each candidate equivalent information about the position, the department or school, and the campus.

Prepare an agenda for the candidate's visit ahead of time. Provide the agenda to the candidate and to appropriate members of the department or school (faculty/students/staff).

Ask if the candidate has any special needs such as physical access needs or dietary limitations. If a candidate requests accommodation for a disability, provide the requested accommodation or consult with the [Disability Compliance Office](#) for more information. In addition to physical access, the University is required by law to provide accommodations such as a sign language interpreter, captioner, written materials in an alternate medium, or flexibility when scheduling appointments.

Usually the campus visit includes a job talk and opportunities to meet with department or school faculty, graduate students, staff and faculty outside the department or school, as appropriate.

Job Talks

If a job talk is part of the campus visit, give each candidate clear instructions about what is expected. For example, clarify whether the department or school is interested in hearing about a specific research topic or a broad overview of research programs and plans. In conducting interviews and job talks, use a consistent format for each candidate, focusing on information relevant to the selection criteria agreed upon in advance. Structure the sessions so that fair comparative judgments can be made.

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During interviews and job talks, do not ask candidates any questions that may relate to the protected categories listed in the University's [non-discrimination policy](#), such as race, color, national origin, religion, sex, gender identity, pregnancy, physical or mental disability, medical condition, genetic information, ancestry, citizenship, age, sexual orientation, marital status or status as a covered veteran (see table below). Beware of social situations! The non-discrimination laws apply to discussions that occur in social settings as well as during formal meetings or job talks. The table on the next page provides guidance about applicable topics.

Interview Topics	
Topic	Discriminatory Questions
Family Status	Are you married? What is your spouse's name? What is your maiden name? Do you have any children or plans to have them? Are you pregnant? What are your childcare arrangements?
Race	What is your race?
Religion	What is your religion? Which church do you attend? What are your religious holidays?
Sex	Are you male or female?
Arrests or Convictions of a Crime	Have you ever been arrested?
Citizenship or Nationality	Are you a U.S. citizen?
Disability	Are you disabled? What is the nature or severity of your disability? What is your condition? Have you had any recent or past illnesses or operations?
Military	In what branches of the armed forces did you serve? If you've been in the military were you honorably discharged?

Evaluating Applicants: Selecting the Final Candidate

Making the final selection

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Every search committee or faculty member conducting a recruitment should establish protocol for making the final candidate selection, including as applicable procedures for evaluating, discussing, voting and making recommendations on top candidates. Any significant departures from the established protocol should be discussed and agreed upon in advance.

Communicating with Candidates

- Maintain communication with candidates. Keep them informed about where the committee is in the process, so they know whether or not they are still under consideration.
- Respect unsuccessful candidates' time by notifying them of their non-selection as soon as a firm decision has been made, and prior to public announcement of appointments, rather than waiting until the entire search process has been completed. As soon as possible after an offer is accepted, finalists not chosen should be notified.

Discussing the Offer

- The discussion of the soft offer should make it clear that all terms are contingent on approval by the campus (whether central campus or Dean). The discussion should include salary, anticipated start date, start-up needs, and space requirements, as relevant.
- Be careful not to make promises that potentially cannot be kept. If something is beyond your immediate control or not supported by UC policy, do not promise or imply it in the process of making the soft offer or in hiring-related conversations.

Overview of Requirements to Complete the Search Report

At the end of the search it is necessary to document the search process, and provide justification for the selection of the proposed candidate(s).

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Search Report

- Verify that the statuses of all individuals who submitted an application are correct and up-to-date
- Enter the Proposed Offer Information about the proposed candidate(s)
- Finish assigning candidate disposition reasons
- Provide comments regarding individuals interviewed and the proposed candidate
- Upload all documentation related to the search (Search Committee Narrative under “letters and memos” and documents created during the search, such as interview notes, under “interview notes”)
- Provide evidence of all advertisement and outreach (including emails)
- Summarize the actual search and recruitment efforts taken to encourage a broad and inclusive pool of applicants
- Select the Initial Search Outcome

Search Committee Narrative

- Upload the summary of the search documenting the search process and the candidates considered for the position, and provide a compelling case for the candidate who is proposed (optional for lecturer, postdoctoral fellow, continuing educator, specialist, and project scientist recruitments).

Completing the Search Report

The purpose of the Search Report is to document the search process, the equitable consideration of all candidates, and provide justification for the choice of the proposed candidate(s).

When to submit a Search Report

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Submit a search report each time a candidate or candidates are put forward for consideration, both for typical searches and for recruitment pools. Multiple candidates can be put forward together if part of the same selection.

Applicant status updates for Search Reports

Review all candidates to confirm that each one has the appropriate statuses applied to them. Please make sure all statuses are marked in the correct sequence. The system will automatically prompt you for the next status. Do not skip statuses because this information is necessary for reporting purposes.

- **Individuals who were deemed unqualified** (“does not meet basic”) should be in the “Unqualified” bucket and have at least one disposition code applied to them.
- **Applicants who met the basic qualifications** should be marked as “meets basic” and appear in the “Qualified” bucket. They should have at least one disposition reason applied to them if they had a complete application but did not proceed to a further round of consideration. For pool searches comments may be needed to indicate that an individual’s expertise is in an area not currently under consideration, but may be considered again in the future. In those cases, select “Other” and specify.
- **Applicants who withdrew prior** to being named on the short list (“recommend for interview”) will appear in the “unqualified” bucket. The “candidate withdrew” disposition reason should be selected.
- **Applicants who were on the “long short list”** or otherwise under serious consideration should have the final status of “serious consideration” if they did not proceed to a further round of consideration. They should have at least one disposition reason applied to them.
- **Applicants who were invited for an interview and interviewed** should have the statuses of “recommend for interview” and “interviewed” (and also “serious consideration” if this status was used). If an applicant withdrew after being recommended for an interview they will have the status of “withdrew after recommend for interview.” Please note that “Recommend for Interview” is not a terminal status.
- **Applicants who were interviewed but did not become a proposed candidate** should have the final status of “interviewed.” At least one disposition reason should be applied, as well as comments about why the candidate was not selected, based on the criteria set out at the beginning of the search (two to three sentences is typically sufficient). For pools be sure to indicate which course or area the individual was interviewed for.

- **Applicants who the department or school intends to put forward to the campus for consideration** should have the statuses of “recommend for interview,” “interviewed,” and “proposed candidate.”
- **No applicants should have a status beyond “proposed candidate” at the time the Search Report is submitted for review and approval.** If the candidate withdrew after becoming the proposed candidate they will have the status of “withdrew after proposed candidate.”

Information about the proposed candidate

Click on the “Proposed Offer Information” icon and provide the department, anticipated start date, step, and annual salary. **This information can be edited on the Manage screen for the Proposed Candidate (on the left column, select the “Information” tab).**

Candidate disposition reasons

One or more dispositions, or reasons for deselection, should be assigned to individuals who submitted a complete application for the position, using either [the list of reasons for those deemed unqualified or the list for those who were qualified.](#)

Do not review or assign disposition reasons to individuals who applied outside the established review period.

Comments on applicants who were interviewed, and the proposed candidate

Applicants who were on the **short list (interviewed)** require brief comments in addition to the disposition reason. It is important that the statements reflect the strengths/weaknesses of the individual applicants, and compare their qualifications to the established search criteria set forth at the beginning of the search. A statement is also needed for the Proposed Candidate (do not select a Disposition Reason).

Advertisement/Outreach evidence

Review the list of advertising locations specified as part of the Search Plan in the “Ad Sources” section. Delete any advertisement sources not used as planned and add any additional locations actually used. Provide evidence of advertisement publication and payment in the “Ad Evidences” section for all locations used in addition to the ones posted to automatically. Please note: If you add additional sources to the list as part of the Search Report, refresh your screen before attempting to upload the evidences.

List separately each search and recruitment effort planned (“Ad Sources”), as stated in the Search Plan [Do not list OFEW sponsored locations, such as the Chronicle of Higher Education, HERC, Higher Ed Jobs, or any of the America’s Job Exchange posting locations].

- Journals
- Advertising websites (Craigslist, etc)
- National organizations
- Employment networks
- Field-specific outreach groups
- Listserves
- Personal emails
- Record of phone calls made and to whom

Upload evidence for each “Ad source” used.

- Tear sheets, invoices
- Evidence of posting
- PDF of emails
- Document with list of calls

Do not include:

- Emails or calls made by department faculty not on the search committee

Documentation

All written materials regarding the search must be uploaded in this section. They will be archived with the search and are not necessary to also save at the department or school level. These materials include:

Under “letters and memos”

- Search committee narrative

Under “interview materials”

All search reports must include a list of the interview questions in addition to interview notes.

Acceptable formats for interview notes:

- Notes on each candidate's response to each question
- Summary of interview responses for each candidate
- Ranking sheet/evaluation template completed for each interviewed candidate

Other interview materials that should be uploaded:

- Notes taken during preliminary interviews (Skype or in-person, for example at conferences)
- Reference checks (typically conducted by phone, with notes)

Do not include:

- Notes taken during candidate job talks or presentations by department faculty or graduate students not on the search committee

Please note:

- Comments and notes can be written directly in AP Recruit by committee members using “Public Comments” or “Personal Notes” for individual applicants

Initial Search Outcome

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Select the Initial Search Outcome of the search. For a successful search select “Proposed Candidate: One or more applicants will be recommended for appointment.”

Approvals

When the Search Report is complete and ready for review, first use the “Preview” button to be sure all required elements are present, and then click the ‘Submit Report for Approval’ button. **Provide a name for the Search Report that includes the last name of the candidate(s).** This will aid in differentiating from the initial Search Report and any others that may be submitted in the future for additional candidates.

Click ‘View Approval Request’ to go to the Approval page.

Download and review the draft Search Report. Edits can continue to be made as needed until the Search Report receives final approval by OFEW; all edits are live updated in the Report. However, once OFEW starts review please do not make additional changes unless notifying OFEW first. Once approved, a final Search Plan is available as a PDF and serves as the permanent record of what was approved.

There is an approval chain for non-senate recruitments:

- **Search Committee Chair (can be the search committee chair, the faculty principal investigator, or the faculty member assigned to reviewing a lecturer pool)** – AP Recruit will auto-populate this field with the person identified in this role on the Search Committee tab)
- **Department Chair (or equivalent, often the Unit Director)** – assign the correct name(s)
- **Dean’s Analyst** – assign the correct name
- **Dean (and often a Dean’s delegate)** – assign the correct name(s)
- **OFEW (“Diversity Office”)** – names are auto-populated (do not add an alternate name)

When the names have been entered, click done. An automatic email will be sent to the first approver within approximately 30 minutes, and will cc the department analyst. When each approver approves the report an email will automatically be sent to the next reviewer in line.

There is an option to provide written comments regarding the Search Report. The analyst and all approvers can view the comments and can make comments. It is also possible to send an email to any or all approvers by selecting the “notify approvers” button. The content of the email will appear in the Comments section.

There is an Approvals Dashboard available (next to the Recruitments tab on the top banner), which will allow you to monitor the progress of approvals for the recruitments you have access to. It displays the current status of approvals, including who has approved and who is next for approval, and includes filters to make viewing the list of recruitments more streamlined.

When OFEW has approved the Search Report, the Report is considered officially approved and the PDF of the Search Report will serve as a permanent record of the recruitment. Please note that approval of the Search Report is **not** approval to hire. Typical hiring processes must be followed for all appointments.

See the section ["Final Closing Instructions for the Search"](#) to close out the search once a hiring outcome is determined.

Closing the Search: Guidelines for the Search Committee Narrative

The purpose of the Search Committee Narrative is (1) to document the search process and the candidates considered for the position, and (2) to provide a compelling case for the candidate who is selected (optional for lecturer, postdoctoral fellow, specialist, project scientist, and continuing educator recruitments even when a search committee is used). This report need not be long; typically several paragraphs are sufficient. Upload it into the Documentation section as part of the Search Report.

Introduction: Provide a brief overview of the search area, efforts made to attract a diverse pool of applicants, and the extent to which the efforts were successful in achieving a broad and inclusive pool.

Overview of the evaluation process:

- Provide a description of how the applicants were reviewed and evaluated, including for example, how many individuals reviewed each file?
- What selection criteria and/or rating scales were used?
- How were the finalists for interview selected?
- How were campus visits conducted (if used)?
- How did the committee rank the finalists (if applicable)?
- How was the proposed candidate ultimately chosen?

Brief narrative description of the finalists: Provide a brief description of the academic strengths of the finalists (everyone who was interviewed) as measured against the selection criteria, and ultimately why individuals were deselected, or became a proposed candidate (or alternate). This information can also be used in the Disposition Reasons section in AP Recruit.

Academic qualifications of the finalist: Describe the strengths of the candidate in relation to the job position, refraining from relying on comparisons with other shortlisted candidates to the extent possible.

Language used to describe the candidates

The Search Committee Report should put forward a description of the **academic strengths** of the candidates. California Proposition 209 and other laws do not allow selection on the basis of identity or personal circumstances. Do not use any personal characteristics when deliberating about or referring to candidates, either in search committee meetings or in the Search Committee Report.

- **Age:** Do not refer to age of the candidate. For example, “young” is not an acceptable criterion. Instead, it is appropriate to indicate early career, which is independent of age or life circumstances.
- **Identity:** Do not refer to the gender or race/ethnicity, or other identities of the candidate. Instead, it is appropriate, if applicable, to describe a track record the candidate may have in working with diverse groups of students or contributing research or service in the area of diversity.
- **Family:** Do not make references to family or children. It is not appropriate to disqualify a candidate because of marital status, such as not knowing whether a candidate would relocate. Moreover, even positive comments such as “she has done amazing work given that she just had a baby” are not appropriate.

Guidelines for Failed Searches

Failed searches when no applicants were acceptable

If candidates were reviewed (whether anyone was interviewed or not), but no one in the pool or search was acceptable for the position a FAILED SEARCH REPORT MUST STILL BE SUBMITTED.

***When candidates are reviewed but none are deemed acceptable, a failed report is needed for liability purposes (for example, if a candidate not selected for a position later files a complaint, the University needs to demonstrate that there was a fair search and a clear rationale for not selecting the individual). ***

The failed search report must include:

- Candidate disposition reasons
- Comments for candidates interviewed
- Evidence of advertisement and outreach
- Search Committee Narrative – brief description of why the search failed
- All written materials created during the search (e.g., interview notes, completed evaluations tools, etc.)
- Final candidate statuses
- Title of the search report should indicate this is a failed search

Approvals: Submit the Search Report for approval in the standard manner for Search Reports.

Conclusion: After the search report is approved, conclude the search using the Conclusions feature on AP Recruit and select "No Candidates Proposed" under the search outcome.

Failed searches when no applicants were needed

If no candidates were needed (pools or IRD nonsenate searches) NO SEARCH REPORT IS NEEDED. The most common reasons include lecturer pools where no candidates were needed, or changes to funding that result in cancelling the search.

Conclusion: The Search can be concluded by selecting "No Candidates Proposed" or "Cancelled" under the Search Outcome, and add a sentence or two to explain the situation.

Final Closing Instructions for Concluding Searches

After the Search Report is approved at the campus level, and there is a hiring outcome for the search, return to AP Recruit to conclude the search. This must be done as soon as possible and is required for data reporting purposes and compliance with University, state, and federal policies and laws.

The “Conclusion” tab has replaced the Search Outcome tab. A search should be concluded after the Search Report is approved, when no new hires will be made, and as soon as one of three conditions is met:

- A candidate for a non-pool recruitment has been hired by the University and the appointment start date and Employee ID are available;
- A pool recruitment reaches the end of the open period (typically 12 months), and appointment start dates and Employee ID information are available; or
- The recruitment is failed or cancelled

Important: Do not move a candidate beyond the status of “proposed candidate” without an official campus offer (unless to indicate that he or she has withdrawn from consideration). Campus offers cannot be made prior to the approval of the Search Report.

If the Proposed Candidate withdraws from consideration **before** an official campus offer is made, change the status to “withdrawn.”

If the Proposed Candidate is made an official formal offer by the campus:

- Change the status to “Offered”
- If the official campus offer is accepted by the Proposed Candidate change the status to “Offer Accepted” (provide required information)
- If the official campus offer is not accepted by the Proposed Candidate change the status to “Offer Declined” (select reason for decline from the list)

If and when the Proposed Candidate has **accepted the official campus offer** and has been formally hired (**information is present in the campus payroll system**), then change the status to “Hired” and Conclude the recruitment.

If the campus declines to make a formal offer to a Proposed Candidate change the status to “campus declined” and Conclude the recruitment.

Appendix A: Advertisement Requirements for Non-Senate Academic Searches at UC Berkeley

1. Job title	✓
2. Relevant department, school, college, or unit.	✓
3. Area of specialization, field (can include “or related field”).	✓
4. If creating a lecturer pool, statement that pool is being generated in case of need, with clear statement about areas included in the pool.	✓
5. Title, rank, step (e.g., Associate Specialist, steps I – IV) or working title.	✓
6. Percent time (if applicable), e.g., full-time, part-time, or exact percent.	✓
7. Expected start date, and duration of position (if applicable). The expected start date should be a reasonable period after the application deadline date to allow for full consideration of all applicants. Use the phrase “expected start date” in the advertisement. For example, “The expected start date is October 1, 2015.” *Optional for non-lecture pools. *Do not use for lecture pools.	✓
8. Position description, e.g., narrative on job duties & responsibilities.	✓
9. Salary or salary range (or, can state that salary is commensurate with experience).	✓
10. Date by when degree must be held if degree is a requirement (e.g., “by start date,” or “at time of application,”) and “or equivalent degree” (e.g., “PhD or equivalent degree,” “Master’s or equivalent degree”).	✓
11. Basic qualifications: Only those individuals who meet the established basic qualifications can be considered applicants, according to the federal government. <u>The basic qualifications must be assessed at the time of application and the requirement must be clear to applicants.</u> Basic qualifications are those that are: <ul style="list-style-type: none"> • 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 candidates”) • Objective (e.g., a Bachelor’s or equivalent degree in Accounting, but not “a technical degree from a good school”) • Relevant to the performance of the particular position • Verifiable by evidence or statements in the applicant’s materials (e.g., “the completion of all degree requirements except the dissertation at the time of application,” “a Master’s or equivalent degree in x or a related field,” “a PhD or equivalent degree in x or a related field at the time of application,” “a Bachelor’s or equivalent degree by date of application”).	✓
12. Additional qualifications: (e.g., a minimum number of years of professional experience in a certain field, expertise with a particular tool or process, proven leadership skills, etc.). These qualifications are <u>required</u> by the start date of the job and must be specific and verifiable.	Optional

13. Preferred qualifications: (e.g., demonstrated organizational skills, proven leadership skills, a PhD or equivalent). These qualifications are not required.	Optional
14. Diversity statement/language. See ‘Creating the Search Plan: Advertisement’ section for suggestions	Recommended
15. Family friendly statement/language. See ‘Creating the Search Plan: Advertisement’ section for suggestions	Recommended
16. How and where to apply (link to AP Recruit for the position), including required documents for a complete application. Confirm that the requirements set up in AP Recruit, including those that are optional versus those that are required, <u>exactly</u> match the stated requirements in the advertisement.	✓
17. Information about reference requirements(if requesting letters at any time during the evaluation and selection process) – Make clear whether you are asking for letters to be submitted at the time of application, or only for contact information. It is fine to solicit letters only from those considered finalists; if so, be sure to state this in the ad (“Letters of reference will only be solicited for finalists”). If requesting letters at the time of application consider adding a deadline by when the letters must be received to be considered for the position (for example, all letters must be uploaded by the final date to apply, or, all letters must be uploaded by X date).	✓
18. Statement regarding referees (include the statement if requesting letters at any time during the evaluation and selection process): “All letters will be treated as confidential per University of California policy and California state law. Please refer potential referees, including when letters are provided via a third party (i.e., dossier service or career center), to the UC Berkeley statement of confidentiality (http://apo.berkeley.edu/evaltr.html) prior to submitting their letters.”	✓
19. All advertisements (except for lecturer pools) <u>must state</u> open until filled. <i>Initial review dates are no longer permitted in the advertisement.</i> However, within the AP Recruit system, the ad must be posted for a minimum of 15 calendar days.	✓
20. Example review language for pools: “Applications will be accepted and reviewed for department needs, through April 30, 2017. We typically review applications for fall course needs in April and May, and in October and November for spring course needs. If you wish to remain in the pool after April 30, 2017 you will need to reapply.” The exact language is up to the advertising unit but be sure that a potential applicant would find your advertisement relevant at any point during the two-year application period.	✓
21. Department or unit contact information for applicant questions.	✓
22. Affirmative Action/Equal Employment Opportunity statement: 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 complete University of California nondiscrimination and affirmative action policy see: http://policy.ucop.edu/doc/4000376/NondiscrimAffirmAct .	✓

Appendix B

Advertisement Template for Lecturer Pools

for Non-Senate Academic Positions at UC Berkeley

The Department of [name] at the University of California, Berkeley invites applications for a pool of qualified temporary instructors to teach [courses] in [department] should an opening arise.

Screening of applicants is ongoing and will continue as needed. The number of positions varies from semester to semester, depending on the needs of the department. Positions may range from [x% to x% time].

[Position description narrative].

Basic qualifications: The minimum qualifications required to be an applicant are the completion of all degree requirements except the dissertation. [Other basic qualifications (optional)].

[Additional qualifications] A PhD or equivalent degree in [area, field, etc] is required by the start date. Experience with [courses, field, etc.] is required [if applicable].

[Salary or salary range].

Diversity statement [e.g., the department is interested in candidates who will contribute to diversity and equal opportunity in higher education through their teaching].

Family friendly statement [e.g., UC Berkeley has an excellent benefits package as well as a number of policies and programs to support employees as they balance work and family].

To apply, please go to the following link: [link to AP Recruit for this position]. Applicants should submit [requirements for submission, e.g., cover letter, curriculum vitae, research statement, summary of teaching experience, publications, etc.]. Applicants should also provide [contact information only or request] [number of] letters of recommendation.

All letters will be treated as confidential per University of California policy and California state law. Please refer potential referees, including when letters are provided via a third party (i.e., dossier service or career center), to the UC Berkeley statement of confidentiality (<http://apo.berkeley.edu/evalltr.html>) prior to submitting their letters.

The posting will remain open until [date, up to two years in advance] to accommodate department needs. Appointments for fall semester are usually reviewed in [month], and for spring semester in [month] (if applicable). The pool will close on [date, up to two years in advance]; if you would like to continue to be considered after that time you will need to submit a new application.

Please note: The use of a lecturer pool does not guarantee that an open position exists. See the review date specified in AP Recruit to learn whether the department is currently reviewing applications for a specific position. If there is no future review date specified, your application may not be considered at this time.

**[ANALYSTS: Please note, in order to ensure that applicants are aware of the current review period, use public review dates, rather than private.]*

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Please direct questions to [contact information].

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 complete University of California nondiscrimination and affirmative action policy see: <http://policy.ucop.edu/doc/4000376/NondiscrimAffirmAct>.

Advertisement Template

for Non-Senate Academic Positions at UC Berkeley

The Department of [department name] at the University of California, Berkeley seeks applications for a [title, rank step], in the area of [specialty or field of study], at percent time [full-time, part-time or exact percent time] with an expected start date of [approximate start date].

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[Position description narrative].

Basic qualifications: A [degree or equivalent] is required at time of application [if applicable, or the completion of all degree requirements except the dissertation are required at time of application]. Experience with [techniques, field, etc.] is required [optional, if applicable]. Other basic qualifications (optional).

[Additional qualifications]. (qualifications required to be hired for the position).

[Preferred qualifications]. (Optional)

[Provide salary or salary range].

Diversity statement [e.g., the department is interested in candidates who will contribute to diversity and equal opportunity in higher education through their work, or other statement].

Family friendly statement [e.g., UC Berkeley has an excellent benefits package as well as a number of policies and programs to support employees as they balance work and family].

To apply, please go to the following link: [link to AP Recruit for this position]. Applicants should submit [requirements for submission, e.g., cover letter, curriculum vitae, research statement, summary of teaching experience, publications, etc., as applicable]. Applicants should also provide [contact information only or request] [number of] letters of recommendation.

All letters will be treated as confidential per University of California policy and California state law. Please refer potential referees, including when letters are provided via a third party (i.e., dossier service or career center), to the UC Berkeley statement of confidentiality (<http://apo.berkeley.edu/evalltr.html>) prior to submitting their letters.

The position will remain open until filled.

Please direct questions to [contact information].

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 complete University of California nondiscrimination and affirmative action policy see: <http://policy.ucop.edu/doc/4000376/NondiscrimAffirmAct>.

Appendix C

Short Advertisement Minimum Requirements

for Non-Senate Academic Positions at UC Berkeley

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The purpose of a “short ad” is to provide brief information about a position when cost is prohibitive to place the entire advertisement in a particular venue. The “short ad” must be reviewed and approved by OFEW at the same time as the standard advertisement. In AP Recruit, if using a “short ad,” include the phrase “short ad” in the title. **It is essential that the short advertisement include a link to the approved standard advertisement; short advertisements cannot stand alone.**

The following information must be included:

- Department, school, college or unit
- Area of specialization, field
- Title, rank, step
- Expected start date and duration if applicable (optional for non-lecture pools)
- Statement: For more information about the position, including required qualifications and application materials go to (link to long advertisement on AP Recruit)
- Deadline date to apply (or Initial Review Date)
- Contact information for questions (email address)
- The University of California, Berkeley is an AA/EEO employer.

Example 1:

The X Lab in the Department of Physics at the University of California, Berkeley is recruiting for an Associate Specialist, levels 1 – 6 to work on the X program. The anticipated start date for the position is December 2015. For more information about the position, including required qualifications and application materials, go to <http://aprecruit.berkeley.edu/JPFXXXXX>. The initial review date is September 1, 2015, but the position will remain open until filled. For questions, please contact Jane Example at janeexample@berkeley.edu. UC Berkeley is an AA/EEO employer.

Example 2 (pool ad):

The School of Journalism at the University of California, Berkeley is recruiting a pool of qualified temporary lecturers to teach undergraduate and graduate courses in the School. Applications will be accepted through October 30, 2016 to fill ongoing needs. For more information about the position, including the next review date for applications, and required qualifications and application materials, go to <http://aprecruit.berkeley.edu/JPFXXXXX>. For questions, please contact Jane Example at janeexample@berkeley.edu. UC Berkeley is an AA/EEO employer.

APPENDIX D

Sample Candidate Evaluation Form⁹

This form offers a method for departments and schools to evaluate faculty candidates. It is meant to be a template for departments and schools that can be modified as appropriate. The proposed criteria are designed for junior faculty candidates; however, alternate language is suggested in parenthesis for senior faculty candidates.

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Candidate's name:

Please indicate which of the following are true for you (check all that apply):

- | | |
|--|--|
| <input type="checkbox"/> Read candidate's CV
<input type="checkbox"/> Read candidate's scholarship
<input type="checkbox"/> Read candidate's letters of recommendation
<input type="checkbox"/> Attended candidate's job talk | <input type="checkbox"/> Met with candidate
<input type="checkbox"/> Attended lunch or dinner with candidate
<input type="checkbox"/> Other (please explain):
<hr style="border: 0; border-top: 1px solid black; margin-bottom: 5px;"/> <hr style="border: 0; border-top: 1px solid black; margin-bottom: 5px;"/> <hr style="border: 0; border-top: 1px solid black;"/> |
|--|--|

Please comment on the candidate's scholarship as reflected in the job talk:

Please comment on the candidate's teaching ability as reflected in the job talk:

Please rate the candidate on each of the following:

	excellent	good	fair	poor	unable to judge
Potential for (Evidence of) scholarly impact					
Potential for (Evidence of) research productivity					
Potential for (Evidence of) research funding					
Potential for (Evidence of) collaboration					
Potential (Demonstrated ability) to attract and supervise graduate students					
Potential (Demonstrated ability) to teach and supervise undergraduates					
Potential (Demonstrated ability) to be a conscientious university community member					
Fit with department's priorities					
Ability to make positive contribution to department's climate					
Past, current, or future plans for contributions to diversity					

Other comments?

⁹ Source: ADVANCE, University of Michigan, <http://sitemaker.umich.edu/advance/home>

Appendix E

Instructions for providing access to AP Recruit for non-Berkeley affiliates

A CalNet Affiliate or a Guest Account needs to be created to provide access to AP Recruit for non-Berkeley affiliates.

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There is a list of HCM roles below which require the person to be an affiliate. If they do not have a role on the list, then use the guest role.

CalNet Affiliate:

HCM roles for Affiliate Status

<https://wikihub.berkeley.edu/display/calnet/People+OU+--+Affiliates>

Consultant Contractor

Committee Member HHMI

Researcher LBL/DOE Post Doc

LBLOP Staff (can only be added by LBL CalNet Deputy)

Retired (can only be added by the Retirement Center)

Temp Agency Staff

Visiting Scholar

Visiting Student Researcher

Volunteer

UC/OP Affiliated Orgs

Calnet Guest Account:

<https://wikihub.berkeley.edu/display/calnet/CalNet+Guest+Accounts>

Once this access is achieved a UID will be provided and can be viewed in the UCB directory. This UID is used to add the user in AP Recruit.

APPENDIX F

Countering Selection Bias

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Regardless of the social groups we belong to, we all perceive people differently based on their demographic characteristics (race/ethnicity, gender, sexual orientation, gender identity, disability, religion, politics, etc.). *However, and importantly, most people try to overcome their stereotypic preconceptions.*

In searches for academic personnel at UC Berkeley it is unacceptable to act on biases, conscious or unconscious. There are many successful strategies for overcoming the tendency we all share to fall back on preconceptions and stereotypes in decision-making.

Diversity offers significant advantages

Recent research reveals advantages of diverse groups in academia and industry. People who are different from one another bring unique information and experiences, and diversity promotes creativity.

One study found that female representation in top management leads to an increase of \$42 million in firm value (Deszo and Ross, 2012). Another study found that papers written by diverse groups have more citations and higher impact factors (Freeman and Huang, 2014). And diverse groups also share more information, while being similar with others makes people believe they all have the same information (Neale, Northcraft, and Philips, 2006).

Assumptions influence the review process

We all like to think that we are objective scholars who judge people based entirely on their experience and achievements, but research on bias in selection shows that every one of us brings a lifetime of experience and cultural history that shapes the review and evaluation process.

The results from studies in which people were asked to make judgments about subjects demonstrate the potentially prejudicial nature of the many implicit assumptions we can make. Examples range from physical and social expectations or assumptions to those that have a clear connection to hiring, even for faculty positions. Consider taking the [Implicit Association Test](#) developed by researchers at Harvard to develop a better understanding of how implicit assumptions operate.

It is important to note that in most of these studies, the gender of the evaluator was not significant, indicating that both men and women share and apply the same assumptions about gender. Recognizing biases and other influences not related to the quality of candidates can help reduce their impact on your search and review of candidates.

Findings on bias in academic evaluations

- Professors at top Universities were contacted by a fictional prospective graduate student. Faculty ignored requests from women and minorities at a significantly higher rate than requests from Caucasian males, particularly in higher-paying disciplines and private institutions (Milkman, Akinola, & Chugh, 2014).
- Research participants redefined the job criteria as requiring credentials that matched those of the desired gender. Commitment to hiring criteria prior to disclosure of applicant gender eliminated discrimination (Uhlmann & Cohen, 2005).
- A study of postdoctoral fellowships awarded by the Medical Research Council in Sweden, found that women candidates needed substantially more publications (the equivalent of 3 more papers in *Nature* or *Science*, or 20 more papers in specialty journals such as *Infection and Immunity* or *Neuroscience*) to achieve the same rating as men, unless they personally knew someone on the panel (Wenneras and Wold, 1997).
- “Blind” auditions can explain 30% to 55% of the increase in women winning orchestral jobs (Goldin & Rouse, 2000).
- A study of over 300 recommendation letters for medical faculty at a large American medical school in the 1990s found that letters for female applicants differed systematically from those for males. Letters written for women were shorter, provided “minimal assurance” rather than solid recommendation, raised more doubts, and portrayed women as students and teachers while portraying men as researchers and professionals. All letters studied were written for successful candidates only (Trix and Psenka, 2003).
- Another study showed that the preference for males was greater when women represented a small proportion of the pool of candidates, as is typical in many academic fields (Heilman, 2001).
- Evaluators who were busy, distracted by other tasks, and under time pressure gave women lower ratings than men for the same written evaluation of job performance. Sex bias decreased when they were able to give all their time and attention to their judgments, which rarely occurs in actual work settings (Martell, date).
- When a male instructor mentioned a male or female partner, the “straight” instructor received 22% more positive comments, while the “gay” instructor received 320% more critical comments (Russ, Simonds, & Hunt, 2002).
- In a national study, 238 academic psychologists (118 male, 120 female) evaluated a resume randomly assigned a male or a female name. Both male and female participants gave the male applicant better evaluations for teaching, research, and service experience and both were more likely to hire the male than the female applicant (Steinpreis, Anders, & Ritzke, 1999).

Mitigating the effects of bias

- Be systematic about evaluation criteria – select them ahead of time, discuss their meaning and how they will be used, and then be diligent about applying them equally to every applicant.
- Allow sufficient time to evaluate each candidate so reliance on snap judgments and stereotypes has less influence.
- Seek advice from individuals who are different from you when evaluating candidates.
- Always have at least two individuals separately evaluate each candidate, and consider using an agreed-upon rating scale to independently weigh each selection criteria.

APPENDIX G

Resources for Recruitment: Doctoral and Postdoctoral Directories

There are several UC and national postdoctoral fellowship programs that provide useful resources for a recruitment that is broad and inclusive of individuals from groups historically underrepresented in higher education.

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UC President's Postdoctoral Fellowship Program

<http://ppfp.ucop.edu/info>

The University of California President's Postdoctoral Fellowship Program was established in 1984 to encourage outstanding women and minority Ph.D. recipients to pursue academic careers at the University of California. The current program offers postdoctoral research fellowships, professional development and faculty mentoring to outstanding scholars in all fields whose research, teaching, and service will contribute to diversity and equal opportunity at UC.

UC Berkeley Chancellor's Postdoctoral Fellowship for Academic Diversity

<http://diversity.berkeley.edu/chancellors-postdoctoral-fellowship>

The Berkeley Chancellor's Postdoctoral Fellowship Program offers postdoctoral research fellowships, faculty mentoring, and eligibility for a hiring incentive to outstanding scholars in all fields whose research, teaching, and service will contribute to diversity and equal opportunity at the University of California.

UC President's and Chancellor's Postdoctoral Fellowship Hiring Incentive

<http://ppfp.ucop.edu/info/fellowship-recipients/hiring-incentive.html>

In 2013, University of California President Janet Napolitano committed \$5 million to continue the salary hiring incentive and initiate a new start-up hiring incentive for President's and Chancellors' postdoctoral fellows appointed since 1996 who obtain tenure-track faculty appointments at one of the UC general campuses. The salary hiring incentive supports former fellows in all fields and provides 5 years of partial salary support to the campus. For information about campus implementation, please contact your department chair or dean.

Directory of Ford Fellows

<http://nrc58.nas.edu/FordFellowDirect/Main/Main.aspx>

The directory contains information on Ford Foundation Postdoctoral fellowship recipients awarded since 1980 and for Foundation predoctoral and dissertation fellowship recipients awarded since 1986. The database is sorted alphabetically by last name and include fields to search by current institution, field of study and year/level of award.

American Association of University Women (AAUW) Directory of Fellowship Recipients

<http://www.aauw.org/what-we-do/educational-funding-and-awards/directory-of-recipients-and-sponsors/>

Fellowship and grant recipients perform research in a wide range of disciplines and work to improve their schools and communities. This directory lists fellowship and grant recipients beginning with the 2004-05 academic year. The listing for

each recipient includes name, institution or location, degree, field of study or project name, AAUW sponsoring fund, and a brief project or work description.

American Indian Sciences and Engineering Society (AISES)

<http://www.aises.org/about>

AISES has developed a comprehensive database to more effectively provide service support to its constituents. In addition, the database provides our members with a capability to maintain current membership records and maximize their visibility to a wide variety of potential employers and other organizations that provide opportunities to our members.

Minority On-Line Information Service (MOLIS)

<http://www.molis.org/>

The MOLIS web site provides an opportunity for a department to search specifically for advanced degree programs offered through 164 Historically Black Colleges and Universities (HBCUs), Hispanic Serving Institutions (HSIs) and other academic institutions. Mailing addresses of these minority institutions is also available via this web site.

The Registry: National Registry of Diverse and Strategic Faculty

<http://www.theregistry.ttu.edu/>

The National Registry of Diverse & Strategic Faculty is a tool designed to help connect current and prospective faculty members from underrepresented groups with institutions of higher education seeking to hire qualified candidates for open faculty positions. Candidates may enter their name and information into the database and then search for available jobs posted by our member institutions. Likewise, for a \$250 annual subscription, member institutions have access to search the database for qualified candidates and post open faculty positions.

APPENDIX H

Optional Rejection Email Templates for Deselected Candidates²

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Example 1:

Thank you for your interest in the X position. The Search Committee has concluded their review of applicants for this position. There were a number of strong candidates applying for the position, and after much deliberation, we regret to inform you that your application is no longer under consideration.

Example 2:

We appreciate your interest in the University of California, Berkeley - Department of X and the position of X for which you applied. After reviewing the applications received by the deadline, yours was not selected for further consideration. The selection committee appreciates the time you invested in your application. We encourage you to apply for posted and advertised positions in our University in the future. We wish you every personal and professional success with your job search and in the future. Thank you again for your interest in our university.

Example 3:

Thank you for your application for the advertised X position in the Department of X at UC Berkeley. Each application has received a careful reading and discussion by all members of the search committee, and I am sorry to have to tell you that the committee has decided to not to proceed any further with yours. We appreciate your interest in the position, as well as the time and effort that went into the preparation of your dossier, and we wish you every possible success in your future professional career.

Example 4:

Thank you for your interest in our advertised position X at the University of California, Berkeley. The final screening of applications for the position has been completed. Your application was considered but you were not selected. We encourage you to continue visiting our website and applying to positions of interest for which you are qualified.

Example 5:

Thank you for your interest in our X faculty position. I regret to inform you that you were not one of our short-listed applicants. I must emphasize that this in no way reflects upon the quality of your work. Our search committee considered very carefully the expertise of all the excellent applicants, and short-listed only those whose work complemented the existing expertise within the department. Again, I thank you very much for your interest in our department. Please accept my warmest good wishes for your future success.

² Please send a more personal email to finalists and/or those interviewed for positions.

APPENDIX I

Outreach Email Templates for Non-Senate Recruitments

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Dear (person or listserve),

I am contacting you in an effort to identify qualified candidates for an open position in my lab. [Introduction and compelling brief description of the position]. A complete job description, which includes instructions for how to apply, can be found [at this link], and is also attached.

I would appreciate it if you can please share information about this open search with your colleagues and within your networks, and encourage individuals to apply. We are particularly interested in learning of candidates who share our University commitment to diversity, equity and inclusion through their research or service.

Dear (person or listserve),

I am writing to share the [X] recruitment advertisement, and to request your assistance in soliciting names of potential outstanding candidates who are prepared to contribute to our goals of diversity and inclusion in higher education. As one of the preeminent public universities in the world, UC Berkeley is committed to equity and inclusion through its leadership and promotion of a positive campus climate for all constituents.

Thank you in advance for sharing our recruitment advertisement with potential candidates. Please let us know of individuals who we should contact directly to encourage the submission of an application.