

UCR

AP Recruit Staff Training 2014-2015AY

Academic Personnel Office and
Office of Faculty and Staff Affirmative Action
July 1, 2014

UNIVERSITY OF CALIFORNIA, RIVERSIDE

Agenda

- › AP Recruit Overview
- › UCR Recruitment Process
- › AP Recruit New Features for 2014-2015AY
- › AP Recruit Roles
- › Live Demo
- › UCR Workarounds
- › Key Points to Remember
- › Office of Faculty & Staff Affirmative Action (OFSAA)
- › Questions and Answers (Q & A)
- › Resources

AP RECRUIT OVERVIEW

UCR AP Recruit Timeline

- ▶ In 2013-2014AY UCR launched a pilot deployment of the AP Recruit system which took place from September 2013 through June 2014.
- ▶ 2013-2014AY Number of Recruitments in AP Recruit (Senate and Non-Senate): 121

UCR AP Recruit Timeline

- ▶ In 2014-2015AY UCR will launch a campuswide mandatory deployment of AP Recruit for all academic recruitments.
- ▶ AP Recruit has been integrated with AP Search (*Search Plan creation and approval functionality*); this provides a more robust, fully featured version of the AP Recruit system that was deployed to all UC campuses beginning 7/1/2014.

UCR AP Recruit Timeline

- All UCR Academic Recruitment Plans for the 2014-2015AY must be managed in AP Recruit. *Notification will be sent to the campus the week of 7/21/14.*
- **7/7/14** –AP Search Features and functionality were deployed to UCR's AP Recruit Production site.
- **8/1/14** – All 14-15 Recruitment Plans must be entered and approved in AP Recruit.

Open Items

The following items are open and are scheduled to be complete by 7/21/14.

- › Hiring Toolkit 14-15AY
- › AA Recruitment Guidelines 14-15AY
- › Pooled Recruitments Guidelines
- › AP Recruit Website Updates
- › “Search Report” Guidelines (new)
- › Workaround for select 14-15AY RP’s submitted for approval outside of AP Recruit
- › Campus Announcement 14-15AY
- › Search Committee + Approvers Online Training 14-15AY

AP Recruit Access

Users login to AP Recruit using their UCR NetID and password.

- **Staff:** In-Person training is mandatory each fiscal year. Access is provided upon completion of training. Access is provided through AP Recruit Administrator or SAA (System Access Administrator).
- **Search Committee + Approvers:** Online training is mandatory each fiscal year and should be completed prior to accessing 2014-2015 Recruitments in AP Recruit . Access is provided through the AP Recruit college/school/unit contact or AP Recruit Analyst.

UCR RECRUITMENT PROCESS

UC Recruitment Process

UCR Academic Recruitment Process & AP Recruit

Allocation of Academic Positions	<ul style="list-style-type: none">• Offline Process
Recruitment Plan Preparation and Approval	<ul style="list-style-type: none">• AP Recruit: New 2014-2015AY
Creation of Recruitments	<ul style="list-style-type: none">• AP Recruit
Application and Review	<ul style="list-style-type: none">• AP Recruit
Short List Approval	<ul style="list-style-type: none">• AP Recruit: New 2014-2015AY
Finalizing the Appointment	<ul style="list-style-type: none">• Offline process
Reporting	<ul style="list-style-type: none">• AP Recruit

NEW FEATURES FOR 14-15AY

New Features for 14-15AY

- › Creating a Recruitment/Search Plan (UCR Recruitment Plan)
- › Recruitment/Search Plan Approval
- › Creating a Short List via Diversity Reports
- › Short List Approval
- › Disposition Reasons (formerly Deselection Codes)
- › Creating a Search Report
- › Search Report Approval

The Recruitment/Search Plan

- › The creation and approval of a Recruitment/Search Plan will be managed via AP Recruit.
- › Components of a Recruitment/Search Plan in AP Recruit
 - General Information
 - Advertisements
 - Selection Process
 - Documentation
 - Diversity
 - Qualifications
 - Committee

Demo/Sample

Diversity Reports

Analysts will be able to generate two types of Diversity Reports and solicit approvals by key people whom they will identify through a drop-down list. Analysts, Equity Advisors, and Diversity Analysts may create the reports at any time or multiple times, even after the recruitment is closed.

Diversity Reports

The Applicant Pool Report

The Applicant Pool report is an interim report. It shows aggregated results from the diversity data collected from applicants who completed their applications, took the survey, and have been marked as “Meets Basic Qualifications.” Their responses are compared against national averages. If there are any shortlisted applicants, this report will not display their identifying information.

Diversity Reports

The Shortlist Report

The Shortlist diversity report shows the same results that are in the Applicant Pool Report *plus short listed applicants are listed by name along with their diversity responses. Any approver will have access to this confidential information on this report. This report must not be shared with the search committee.*

Demo/Sample

Disposition Reasons

- › Formerly Deselection Codes
- › Analysts, editors, and/or committee chairs may assign reasons or multiple reasons as to why qualified and unqualified applicants did not advance in the hiring process. The reasons will be part of the search *report*.

Disposition Reasons

- ▶ There are 2 Disposition Reason Categories:
 - ▶ Disposition Reason Choices for Meets Basic Qualifications – for applicants who meet the Basic Qualifications but did not move further in the hiring process.
 - ▶ Disposition Reasons Choices for Does Not Meet Basic Qualifications – for applicants who do not meet the Basic Qualifications.

Demo/Sample

The Search Report

- › AP Recruit allows for the creation of a final Search Report.
- › The following is a list of the components that will be bundled into the Search Report. Much of this information will have been input as part of the Recruitment/Search Plan.
 - General Information
 - Information on selected candidate
 - Search & recruitment efforts
 - Applicant disposition reasons
 - Advertisements
 - Documentation
 - Misc Documents

Demo/Sample

AP Recruit Roles

New for 2014-2015AY – Committee Roles

The designation between “Core” members and “Additional” members helps to satisfy annual reporting requirements for UCOP regarding applicant pools and search committee demographics.



AP Recruit Roles

- **Recruit Administrators** are the primary supporters for all other users and have the most Admin tool access and all the access rights.
- **Central AP Analysts** have access to download a CSV of applicant pool and gender/ethnicity data.
- **Diversity Analysts** (OFSA) have access to view an application for a given recruitment, department, college or school. They can also manage (create & view) diversity reports for a given department, college or school and can download a CSV of all diversity survey responses.
- **Approvers** (*new as of 7/1/2014*) have access to review and approve Recruitment Plan, Recruitment Report and Shortlist Report



AP Recruit Roles

- › ***Department Analysts*** (no reports) create the recruitments for their departments. They build search committees, view and manage all applicant files, short-list the candidates and create reports that are specific to their role.
- › ***School/College Analysts*** have the same access rights as the Department Analyst but on the School/College level.
- › ***Equity Advisors*** (college/school/unit) have access to view an application for a given recruitment, department, college or school and can manage (create & view) diversity reports for a given department, college or school.

AP Recruit Roles

- › **Committee Chairs** can review non-finalized applicants and may manage applicant files (though this is generally left to the Analyst).
- › **Committee Editors** (faculty/staff) have the same access rights as Chairs. Editors generally assist in managing the applications. At UCR this role is assigned to the AACO (Affirmative Action Compliance Officer).
- › **Search Committee Reviewers** have viewing rights to finalized applications and may comment on the files and flag applicants.

LIVE DEMO

UCR WORKAROUNDS

UCR Workarounds

- › *Managing Pooled Recruitments*
- › *Managing approvals*
- › **Posting Open Rank Recruitments**
- › **Managing reference letters beyond maximum**
- › Ranking
- › Cross Listed Recruitments
- › External Reviewers

UCR Workarounds

- › ***Managing Pooled Recruitments***
 - › *Guidelines will be completed, distributed and posted to the AP Recruit website by 7.21.14*
- › ***Managing approvals***
 - › *This process will be reviewed during the OFSAA portion of this presentation.*

UCR Workarounds

- › **Posting Open Rank Recruitments**
- › Departments will need to create **two search plans and submit for approval** in order to be able to create two recruitments in AP Recruit. One recruitment for Non-Tenured applicants and a second recruitment for Tenured Applicants. This process is required for OFSAA statistical analysis of the applicant pool.
- › Applicants pools and shortlists will need to be reviewed/approved separately.
- › Your ad should include either a general link to <http://aprecruit.ucr.edu> or two separate links to each recruitment in AP Recruit.

UCR Workarounds

- › **Managing Reference Letters beyond Max**
- › Once the maximum number of reference letters has been added to an applicant's record in AP Recruit, the recruit analyst is unable to upload additional letters received beyond the maximum setting in the recruitment.
- › In order to avoid this workaround, we recommend setting the maximum reference letters to a “high number” to avoid having to store additional reference letters outside of AP Recruit.
- › **Review Workaround**

UCR Workarounds

- › Ranking
 - › AP Recruit does not provide a way to rank candidates
 - › The Campus Workgroup (CWG) recommends that rankings are added to the reviewer comments field . After the column is downloaded, the department analyst can manipulate the spreadsheet as needed per the ORG business process to assist with ranking the candidates for their ORG.
 - › Departments will have to determine the best internal process for ranking candidates.

UCR Workarounds

› Cross Listed Recruitments

- › Send the information to aprecruit@ucr.edu once the recruitment is created.
 - › Send the JP#
 - › Provide the names of the department(s) to cross-list
- › The main advantage to cross-listing recruitments is how it is presented to the applicants. On the main /apply page, the recruitment will be listed several times on that page, under each department. And when the applicant clicks the "apply" link, all the departments will be listed on the screen.
- › APO will coordinate with UCI to display the recruitment for both departments and notify you when it is completed.

UCR Workarounds

› External Reviewers

- › If there is an external reviewer on your search committee, you will need to request an affiliate account and UCR NetID for the external reviewer via C&C.
 - › <http://cnc.ucr.edu/edir/affiliateacc.html>
 - › Turnaround time for creation of the NetID is approximately 48 to 72 hours.
- › Once the NetID is created, the NetID will be available in AP Recruit the next business day after 9:00am.
- › If you encounter any issues, please email aprecruit@ucr.edu.

KEY POINTS TO REMEMBER

Key Points to Remember

- › **Required Documents & References** – complete this requirement carefully and thoughtfully. These fields cannot be changed once the first applicant has applied.
 - › Set the maximum reference letters to a “high number” to avoid having to store additional reference letters outside of AP Recruit.
- › **Submitting a Search Plan for approval** – be sure to complete and review all of the UCR required sections of the search plan prior to submitting a Search Plan for approval. The AP Recruit system does not enforce this rule.
- › **Approved Recruitment/Search Plan** – a recruitment cannot be published without an approved plan.
- › **Publishing Search Plans** – when a recruitment is published, the Recruitment is immediately accessible by the search committee members and will become visible to applicants on the open date of the recruitment.

Key Points to Remember

- › **Hired Candidates** – when a recruitment is completed, please update the status of all candidates on the short list and be sure to indicate the Hired Candidate in AP Recruit. This data is used by UCOP for compliance reporting.
- › **Archive/Inactivate Recruitment** – do this once a recruitment is done. If the recruitment is not archived, applicants, if hired, can potentially see their reference letters and previous/other applicants.
- › **Personal Notes** – use discretion when using this field. This is permanently stored in the system, and is a part of the recruitment record and is subject to disclosure.
- › **Reports** – the **last page of the Shortlist Report** contains sensitive data. Equity Advisors & Recruit Analyst, please **do not** distribute the last page to the search committee chair and members.

Key Points to Remember

› Initial Review Date (IRD)

- › Used for collecting pools of applicants separated by review dates.
- › The initial review date marks the closing of the first pool of applicants
- › After the initial review date has passed, applicants will be advised that their applicant may or may not be reviewed by the search committee.
- › After the initial review date has lapsed additional review dates may be added to extend the review period.

› Meets Basic Qualifications (MBQ)

- › An Analyst, editor or chair can mark applicants as “Meets” or “Does Not Meet” basic qualifications.
- › Only qualified applicants will be included in the diversity report.
- › You need to evaluate and mark each applicant individually from within their application.
- › Refer to the MBQ Support and Training information located at <http://cnc.ucr.edu/aprecruit/training.html>

Office of Faculty & Staff Affirmative Action (OFSA)

- › **Expanded AA/EEO Recruitment Requirements**
 - › Applicant Invitation to Self-identify
 - › EEO Tagline in All Job Solicitations and Ads
 - › Goals and Benchmarks
 - › Increased Outreach & Recruitment Responsibilities
 - › Retention of Recruitment Data and Records
- › **New Recruitment Compliance Review Process**
 - › Search Plan Approval
 - › Short List Approval



EEO/AA Requirements

› Regulatory Changes

- › The revised Section 503 of the Rehabilitation Act of 1973, as amended, contains new affirmative action requirements for federal contractors with respect to recruiting and hiring **individuals with disabilities**.
- › The revised Vietnam Era Veterans' Readjustment Assistance Act of 1974, as amended, contains new affirmative action requirements for federal contractors with respect to recruiting and hiring **protected veterans**.

EEO/AA Requirements

› Applicant Invitation to Self-Identify

- Under the Old Rules

- › Gender
- › Race/Ethnicity

Demographic Survey Response Rates for the “Final and Closed Searches” as of June 30, 2014 (randomly selected)

Chemistry: 97.6%
Dance: 100%
Economics: 96.7%
Hispanic Studies: 97.6%
Library: 100%

- Under the New Rules

- › Gender
- › Race/Ethnicity
- › Disability Status
 - › Pre-offer / Post-offer
- › Protected Veteran Status
 - › Pre-offer: to self identify as a protected veteran
 - › Post-offer: to self identify as to the specific veteran category

EEO/AA Requirements

› EEO Tagline

- › All position descriptions, letters, and ads must include the required equal employment opportunity tagline.

Long Version (UC best practice):

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, national origin, age, disability, protected veteran status, or any other characteristic protected by law.

Short Version (cost or spacing concern):

The University of California is an Equal Opportunity/Affirmative Action/Disability/Veterans Employer. **OR**
EEO/AA/Disability/Vets Employer

EEO/AA Requirements

› **Goals and Benchmarks**

› **Placement Goals for Women and Minorities**

UCR establishes annual percentage placement goals for all job groups where underutilization is identified, and uses the goals to measure progress toward achieving equal employment opportunity.

› **Utilization Goal for Individuals with Disabilities**

UCR uses the national utilization goal of 7% for qualified individuals with disabilities to identify problem areas.

› **Hiring Benchmark for Protected Veterans**

UCR uses the national benchmark of 7.2% for protected veterans to measure the success of outreach efforts.

EEO/AA Requirements

› Outreach and Recruitment Efforts

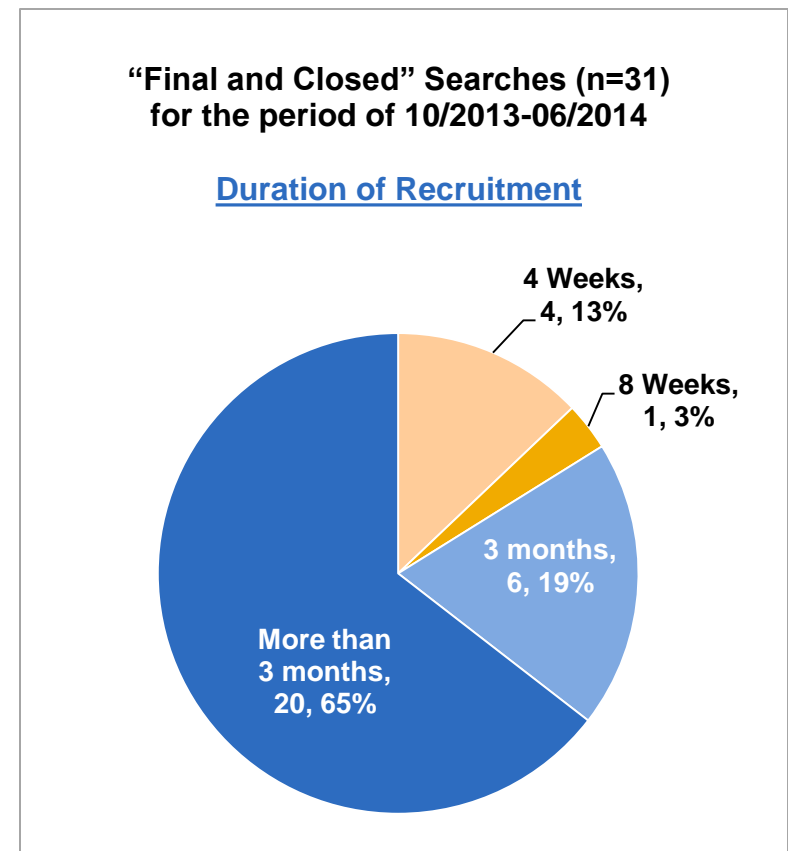
- › Advertise in a broad range of print and electronic media to obtain a diverse pool of highly qualified applicants;
- › Advertise in venues that are likely to reach women, minorities, protected veterans and individuals with disabilities;
- › Expand outreach efforts, including using OFCCP's Disability and Veteran Community Resources Directory (<http://www.dol-esa.gov/errd/resources.html>);
- › Identify alternative outreach and recruitment efforts if the totality of efforts hasn't been effective.

EEO/AA Requirements

➤ Outreach and Recruitment Efforts (Cont.)

➤ Recruitment Period

- *Guideline 1:* Should be for 8 weeks, including at least a **30-day** period following the first appearance of the advertisement.
- *Guideline 2:* Include at least a **30-day** period following the first appearance of the advertisement.



EEO/AA Requirements

› Record Retention

› OFCCP's New Requirement

Records and data pertaining to recruitment and hiring must be maintained for **3 years**; all other documents for **2 years**.

› UC's Revised Recruitment Record Schedule

- ❖ Official records such as search records, applications, resume records, search committee records, interview records must be retained for **4 years**.
- ❖ All UCR recruitment-related recordings, including those that are generated and stored outside the AP Recruit system such as department notes, agendas, letters, and email exchanges, must be maintained for **at least 4 years**.

EEO/AA Requirements

Summary of Changes in Recruitment Compliance

Compliance Area	Old Requirement	New Requirement
Applicant Self-Identification	Gender, Race/Ethnicity	Gender, Race/Ethnicity, Disability and Protected Veteran Status
EEO Tagline	Gender, Race/Ethnicity	Gender, Race/Ethnicity, Disability and Protected Veteran Status
Goals	Placement Goals	Placement Goals, Utilization Goal, and Hiring Benchmark
Good Faith Efforts	Recruitment and Outreach Efforts	Recruit and Outreach Efforts; Documentation and Assessment
Record Retention	3 Years	4 Years

APPROVAL PROCESSES

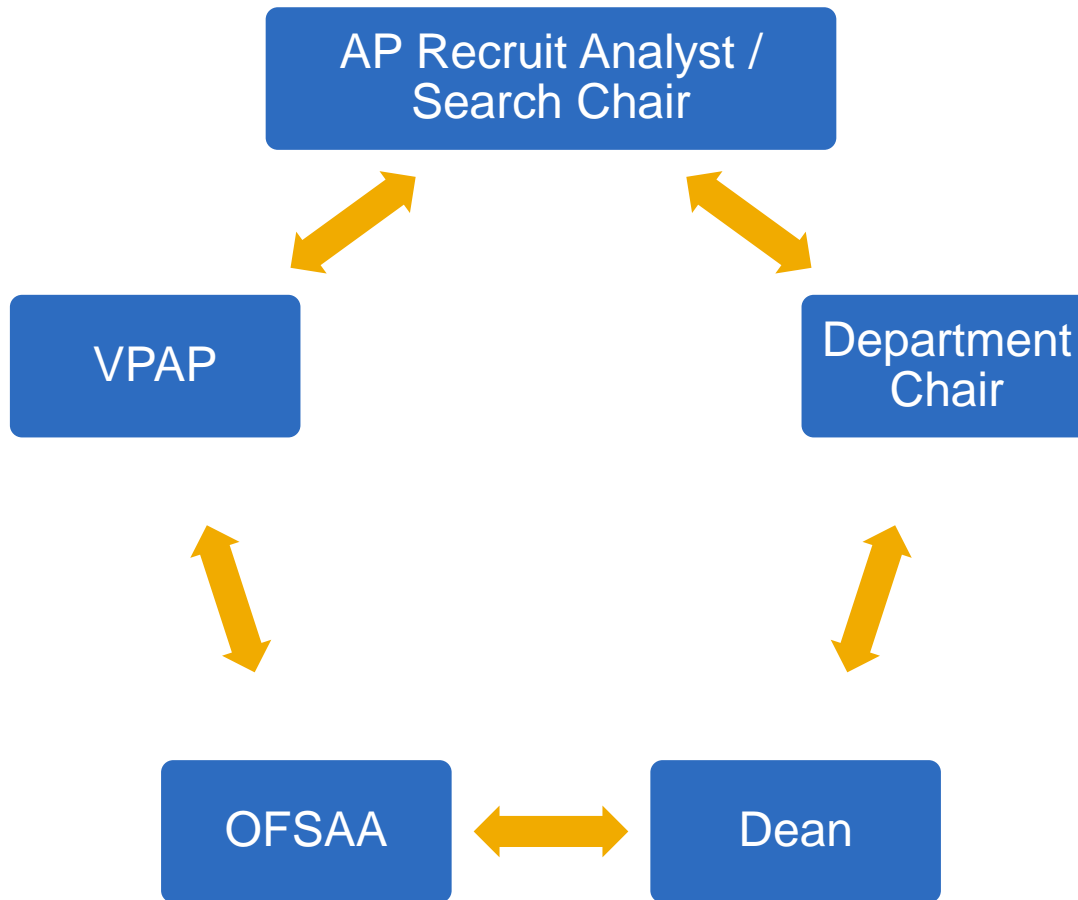
Search Plan Approval Process

- › **Create recruitment in AP Recruit**
 - › Indicate Affirmative Action Goals
 - › Include ad sources
 - › Ad Documents (to be submit)
 - › Comment “Outreach effort for (specify AA Category)”
 - › Ad Evidences (proof of ad submissions i.e. receipts, screen shots, scanned copies from journals, etc)

Search Plan Approval Process

- Email notification sent to OFSAA for Approval
 - Reason for search plan “deny” will be stated in comments
- Once the first Approver has approved the plan no edits should be made to the search plan
- Any revisions to a previously approved plan, including modifications of advertising venues or changes in the composition of the search committee, must be approved by OFSAA

Search Plan Approval Process



- › Analyst initiates approval chain
 - › Approval must be received in sequential order
- › Final approval is determined by VPAP
 - › Analyst will be notified via email
- › Additional approvers may be added

Qualified Applicant Grid

- › View Qualified Applicants
- › Select columns:
 - › Applicant
 - › Status
 - › Survey Taken?
 - › References
 - › Disposition Comment
- › *AA Compliance Form no longer needed*

Short List Approval Process

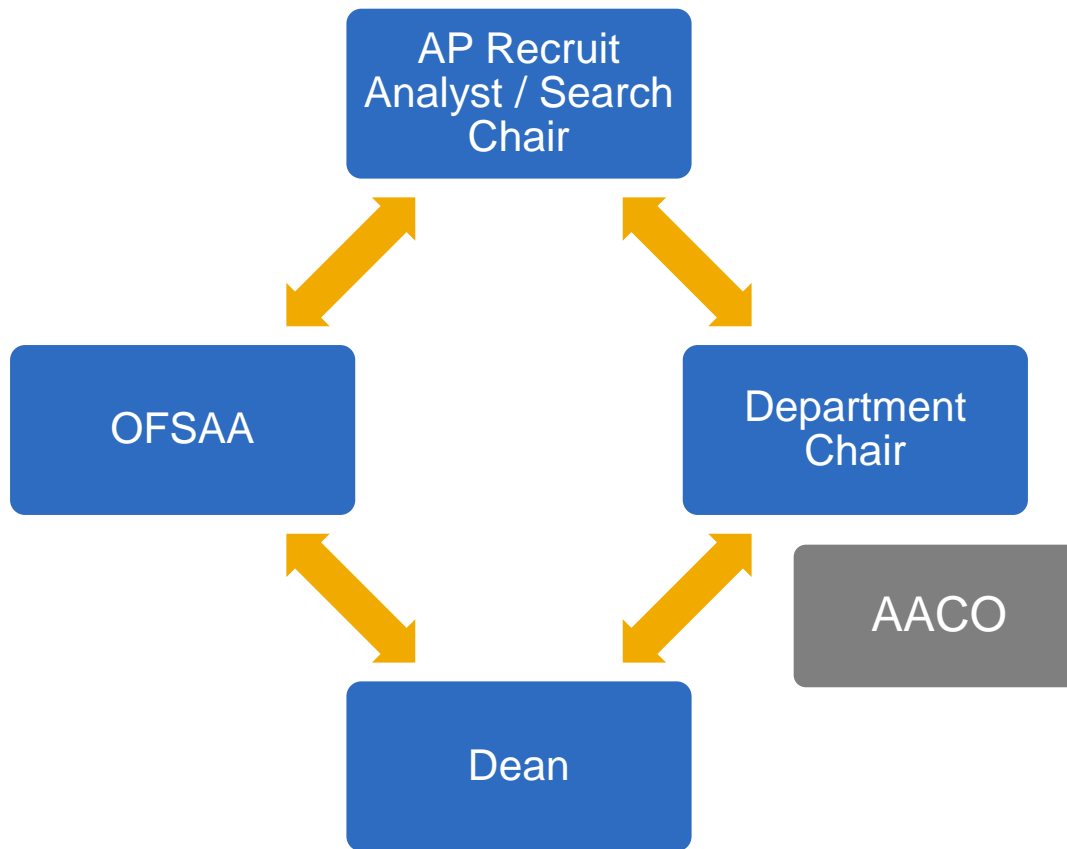
- › Shortlist Review
 - › Create new Diversity Report
 - › Select “Shortlist” as report type
 - › Submit as shortlist

- › Shortlist Report
 - › Contains sensitive applicant data
 - › **Should not be shared with the Search chair or Search Committee Members**

Short List Approval Process

- Email notification sent to OFSAA for Approval
 - Email Template
 - Reason for search plan “deny” will be stated in comments

Shortlist Approval Process



- › Analyst initiates approval chain
 - › Approval must be received in sequential order
- › AACO
 - › Ensures compliance
 - › “Sign-off” on shortlist concurrently with search chair
- › **Additional Approvers SHOULD NOT be added**

Closing the Recruitment

Selection Process

- › Selection Criteria
 - › Upload criterion for ranking applicants
- › Selection Plan
 - › Plan for ranking and selecting applicants

Documentation

- › Search Plan Documents
 - › Changes to search plan, ads, or committee members
- › Letters & Memos
 - › Appointment Letter
- › Interview Materials
 - › Interview questions and notes from the search committee

Inactivate the Recruitment

Resources

- › Levels of Support
- › Contact Information
- › Online Resources
- › AP Recruit Access

Resources

› Levels of Support

- › **First Level Support:** Peer User Group. Peer User Group within each College; the peer group will interact with one another and provide first line support.
- › **Second Level Support:** College Support. If the Peer User Group users cannot resolve an issue, it will be escalated to the College for resolution. The College will copy aprecruit@ucr.edu on any problems and resolution.
- › **Third Level Support:** UCR Core Project Team via aprecruit@ucr.edu. If the College cannot resolve the issue, it will be escalated to C&C for resolution.

Resources

› Contact Information

› College/School/Organization:

<http://cnc.ucr.edu/aprecruit/contacts.html>

› Central Academic Personnel Office:

Antonette Toney, Sara Umali, Theresa Wimbley

aprecruit@ucr.edu

› Office of Faculty and Staff Affirmative Action (OFSA)

Erica Jiang erica.jiang@ucr.edu

Brittnee Agosto brittnee.agosto@ucr.edu

Resources

› Online Resources

- › UCR AP Recruit Information Website:
<http://cnc.ucr.edu/aprecruit/>
- › AP Recruit User Guide:
http://cnc.ucr.edu/aprecruit/ucr_aprecruit_user_guide.pdf
- › Academic Hiring Toolkit:
http://cnc.ucr.edu/aprecruit/academic_hiring_toolkit.pdf
- › Affirmative Action Recruitment Guidelines

- › UCI AP Recruit Blog: <http://sites.uci.edu/aprecruit/>
(Provides latest developments in Recruit. Note: This is written specifically with the UCI audience in mind.)

Resources

- › AP Recruit Sites
 - › Production site <https://aprecruit.ucr.edu/>
 - › Training site <https://aprecruit.ucr.edu/training>
 - › Development/Quality Assurance (QA) site <https://aprecruit.ucr.edu:31040/>

Thank You

You have completed the training and information session for AP Recruit 2014-2015AY.