

EPA Recruitment and Selection Procedures

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Procedures for EPA Personnel

The University of North Carolina at Chapel Hill is committed to providing equal access to our employment environment; and ensures that all employment-related decisions are in accordance with the principles of equal opportunity.

The Equal Opportunity/ADA Office is responsible for monitoring the university's equal opportunity and affirmative action efforts; and the recruitment and search process.

The following procedures are designed to provide guidance to the university community on meeting equal opportunity/affirmative action obligations.

For detailed information on equal opportunity and affirmative action at UNC-CH, please visit our website at: <http://www.unc.edu/depts/eoada>

EPA Recruitment & Selection: EPA RecruitmentWeb

EPA RecruitmentWeb is a web based recruitment and applicant tracking system created to streamline the recruitment and application processes for EPA Faculty and Non-Faculty positions. Use of this system is **required**; and replaces all former paper processes.

Features of the new system include:

- Online recruitment requisition processing
- Automatic web posting of approved recruitments to both the UNC-CH and Inside Higher Ed (IHE) websites
- Online collection of basic applicant data including EEO race and gender data, attachment of curriculum vitas (CVs) or resumes as appropriate, cover letters and up to 5 additional documents as specified by a department in the candidate instructions
- Online collection and feed of applicant and hiring data to EEO monitoring software tools to assure good faith compliance effort
- Immediate access to applicant materials by hiring managers and search committee members
- Online submission of all interim and final EPA EEO documentation
- Integration with the Position Management component for EPA Non-faculty
- **Recruitment ID (Rec ID)** – Randomly generated numbers used to identify recruitment requisitions. The Rec ID replaces the Recruitment Plan # formerly used in the paper recruitment process.
- **Position Numbers** – Randomly generated numbers in position management used to identify an EPA Non-Faculty positions.
- **Position Posting Category** – A category assigned during the creation of a requisition that is used to group similar positions. Applicants may search for positions on a number of parameters including position posting category.

EPA Recruitment & Selection: Recruitment Plan/Create Recruitment Requisition

I. INITIAL APPOINTMENTS

1. Once a vacancy for an EPA Faculty or Non-Faculty position occurs, a Recruitment Requisition should be created and routed through EPA RecruitmentWeb for approval. Proposed **advertisement(s)** need to be attached when the department/unit will advertise in additional venues beyond the UNC-CH and IHE websites. The Recruitment Requisition replaces the former EOF-1 form.

- Search procedures apply to all EPA Faculty and Non-Faculty recruitments with an **FTE of 50% or more and no less than one year in length**.
- Two **new routing stops** will be required for EPA requisitions; a department level EEO officer will approve all recruitments for their unit and the University EEO office will be the final routing stop for all EPA RecruitmentWeb actions. **The departmental EPA HR and the departmental EEO Officer cannot be the approver in both of these capacities on the same action.**
- **Multiple positions** with the same qualifications/requirements can be recruited for on the same requisition. For EPA Non-Faculty jobs, only 1 position number from Position Management is needed to initiate a requisition.
- **Department employee counts** are automatically generated by the EPA RecruitmentWeb system.
- For detailed instructions on **how to complete the Recruitment Requisition form**, please view the EPA RecruitmentWeb User Guide at: <http://hrisguide.unc.edu/epa-rw/>

2. Use of Search Firms for EPA Faculty and Non-Faculty Positions

It is acceptable to use search firms when conducting an open search to fill an EPA Faculty or Non-Faculty position at the University of North Carolina at Chapel Hill. It will be the responsibility of the hiring department to familiarize the search firm with the University's hiring policies and practices. It will also be the department's responsibility to cover any fees associated with the search firms.

EPA Recruitment & Selection: Recruitment Plan/Create Recruitment Requisition

Departments utilizing search firms will need to ensure the requisitions are processed in RecruitmentWeb.

3. EPA Non-Faculty Positions

- **EPA Non-Faculty positions** must be created and active in position management prior to initiating a recruitment requisition.
- EPA Non-Faculty requisitions have 5 fields that are directly populated with data from Position Management. The *position summary, educational requirements, qualifications/experience, working title, and salary range* fields are all pulled from Position Management and may **not be edited within the recruitment requisition**. **Prior to initiating a recruitment requisition for all EPA Non-Faculty positions, the department should review these fields in position management to determine whether or not updates are necessary.**

4. Posting Periods

- **Tenured/Tenure Track positions** – must be advertised **nationally** for a minimum of **45** days.
- **Administrative Appointment with Faculty Rank** (Example: Provost, Deans, Chair) – must be advertised **nationally** for a minimum of **45** days.
- **Fixed-Term Faculty** – must be advertised **locally and regionally** for a minimum of **30** days. The automatic posting to the Inside Higher Education website meets the regional requirement.
- **EPA Non-Faculty** positions including Research Assistant and Research Associate positions must be advertised for a minimum of **30 days** and must appear in UNC-CH Employment Opportunities, unless the Equal Opportunity Office approves a request for a shorter advertising period.
- **Senior level positions** must be advertised regionally with selected positions advertised nationally (Example: Vice Chancellor's, Directors, and Deans) for a minimum of 30 days.

EPA Recruitment & Selection: Recruitment Plan/Create Recruitment Requisition

Posting Periods (Con't):

- If the requested **posting period** is less than the default minimum, the user must provide justification in the comments box.
- Positions will either be **open until filled** or have an **application deadline**. If open until filled, the job will be advertised until the position is filled.
- Maximum Requisition Period
 - 1 year from the initial posting date
 - Expectation that after 1 year departments will close existing requisitions with little to no activity **or**
 - Close existing requisitions and initiate a new requisition to replace the outdated requisition **or**
 - Submit a request to the EEO Office for an extension as a modify requisition in RecruitmentWeb

5. Advertisements

- **Advertisement(s) need to be attached** to the Recruitment Requisition action **when** the dept/unit will advertise in additional venues beyond the UNC-CH and IHE websites.
- Information to include in external advertisements:
 - Name of the University, College and Department
 - Title of the position
 - Responsibilities of the position (position summary)
 - Minimum and preferred education, experience and skills
 - Specific applicant instructions for submitting additional materials should be included when applicable.
 - Application deadline
 - The advertisement should always include the EEO statement for the University: "The University of North Carolina at Chapel Hill is an Equal Opportunity Employer" or "EOE".
 - The advertisement should include the Direct Job Posting URL jobs.unc.edu/xxxxxxx = Recruitment ID for Job Posting.

EPA Recruitment & Selection: Recruitment Plan/Create Recruitment Requisition

6. Advertisement Sources

- National professional journals and newspapers
- Regional journals and newspapers
- Letters and announcements to schools
- Professional meetings (**provide name and date of meetings**)
- Other recruitment methods (provide the name & addresses for listserv's and web sites)
- The Equal Opportunity Office has purchased a membership subscription to the **National Minority Faculty ID Program**. Please contact the EOO office for login and password.

Reminder: Check publication dates for National and Professional journals. As you will need to ensure the application deadline is 30 to 45 days after the print advertisement appears. If position is “open until filled” this is not an issue.

7. Recruitment Efforts

- **Special efforts to identify minority and female candidates.** (Examples: list professional caucuses, organizations and universities). Identify efforts the department will undertake to reach minority and female populations.
- List any special recruitment activities that will be a part of this search. (Example: interviewing at professional meetings)

8. Search Committee Appointments

- A **minimum of 3** search committee members is required (internal & external combined).
- A Search Committee Chair must be identified – you may have 1 or 2 individuals assigned as chairs (internal & external combined).

EPA Recruitment & Selection: Create Recruitment Requisition

Search Committee Appointments (Con't)

- ***If no females and no minorities are included on the search committee, the department is required to provide an explanation/justification in the comments box.*** Every effort should be made to include female and minorities on the search committee. Recruiting members from other departments or including members who may not specialize in the technical area, but who understand the search process, can add diversity to the committee and valuable feedback on candidate selection.
- Internal search committee members – When the system displays the Primary Rank/Title as “Other”, departments must provide the appropriate primary rank/title in the comments box.
- SPA employees may serve on search committees.
- *External search committee members* will require an onyen to access the applicant data related to searches. External members who do not have an active onyen may be assigned one through the affiliate system.
- All hiring supervisors, search committee chairs and members should complete the Online Training Module before beginning the search process. The module can be accessed at <http://www.unc.edu/depts/oooada/sct/> or from the [Equal Opportunity/ADA Office](#) web site by clicking [Online Training](#).

9. Screening Questions:

Screening questions allow the system to pre-screen applicants for the department. Although optional, all applicants will be prompted to respond to the following screening questions. Applicants not meeting the minimum requirements will be pre-excluded. *Please note, pre-excluded applicants will not be completely excluded unless the applicant status is changed to **excluded** and a **reason for non-selection** is marked for applicable applicants.*

Default screening questions:

- Please choose the minimum degree required for this position from the following: Associate, Bachelor, Masters, PhD.

- Please enter the minimum years of experience required for this position.
- Does the position require any special licenses or certifications?

In addition to the three default screening questions, the department can add up to five additional questions.

EPA Recruitment & Selection: Modify Recruitment Requisition

II. Modify Recruitment Requisition

1. The Modify Recruitment Requisition is used to change fields on an active requisition. The only fields that may ***not be modified*** are the screening questions. Once a requisition is completed and posted to the applicant website, these questions ***cannot*** be changed.
 - The modify requisition replaces the use of memos to communicate recruitment plan changes to the EEO office; and also updates details posted to the website.
 - When a modify requisition is initiated, the user must indicate whether or not the posting period must be reset. For some changes, the answer is yes, and this will restart the minimum posting period (the 30 or 45 days that must elapse before an interim selection document may be submitted). ***Note: If you are uncertain as to whether or not the modification being made will require resetting the posting period, please consult with the EEO Office.***
 - For detailed instructions on **how to complete and submit a Modify Requisition form**, please view the EPA RecruitmentWeb User Guide at: <http://hrisguide.unc.edu/epa-rw/>
2. **How to find and/or search for an action:**
 - Click on Recruitment Web
 - Select “Action Search”
 - Enter department number
 - Select – type of action
 - Click “Search”
3. **How can positions be reposted and when should the posting period be reset?**

When there is a need to extend the posting period, the position can be reposted in one of two ways depending on whether or not the position is still posted on the website. Create a Modify Requisition and do the following:

EPA Recruitment & Selection: Modify Recruitment Requisition

Reposting positions (Con't)

If the position is **no longer posted** on the website:

- Open until filled – **Yes or No (check appropriate box)**
- Reset minimum posting period should be **yes**.
- Enter new date for application deadline if checked “No” for “open until filled”.
- Posting Days - number of days will populate automatically.

If the position is **still posted** on the website, and the department would like to extend the posting period:

- Open until filled – **Yes or No (check appropriate box)**
- Reset minimum posting period should be **yes**.
- Enter new date for application deadline.
- Posting Days - The number of days will populate automatically.

If the position is “**Open until filled**” and the department would like to remove the advertisement from the website due to having met the minimum required posting period of 30 or 45 days and/or if the department have received an adequate number of applications.

- Open until filled – No
- Reset minimum posting period – No
- Enter date for application deadline (should be a date after the approval date in Equal Opportunity)

EPA Recruitment & Selection: Interim Selection Document

III. The Interim **Selection Document** replaces the former Interim Equal Opportunity Statement (EOF-2 & 2A). The Interim Selection Document should be submitted:

- **after** the application deadline,
- **after** the minimum posting period (**30 or 45 days**) and
- **before** interviews are offered to candidates.

Exceptions to this policy require prior discussion and written approval from the EEO Office.

- The Interim Selection Document is used to track and report on the entire applicant pool. Multiple Interim Selection documents should be submitted as interview dates are entered for applicants invited to meet with the department. Reasons for non-selection should be entered as they are tracked for excluded applicants.
- Either the HR Facilitator or the Search Committee Chair may update interview dates and reasons for non-selection.
- Only the HR Facilitator or others assigned the appropriate access (such as search committee chairs) are allowed to submit the Interim Selection Documents.
- Applicant status changes may be made at any time, including exclusions. One reason is required, but up to 3 reasons for non-selection may be submitted.
- As noted above, the Interim Selection Document may be submitted multiple times as candidates apply and are invited to campus for interviews.
- All applicants listed as remaining under consideration do not have to be interviewed. Submitting an extended list initially may prevent the unit from having to later submit an Interim Selection Document to request permission to interview additional applicants that may have been previously excluded.
- Certification by the Departmental Equal Opportunity Officer (EPA EEO) and the Director/Chair/Dean that the recruitment and selection activities conform to the principles and objectives of the Equal Opportunity Plan is required. Please note: HR Facilitators cannot approve for both the EPA HR role and the Dept EEO role on the same action.

EPA Recruitment & Selection: Final Selection Document

IV. Final Selection Document

1. The **Final Selection Document** replaces the former Final Equal Opportunity Statement (EOF-3).
 - When a candidate has been selected, the Final Selection Document is completed. All excluded candidates must have at least 1 reason for non-selection marked. Candidate's sill under consideration as a finalist does not need an exclusion code.
 - The recommended salary for EPA Non-Faculty must be within the range approved in the requisition, otherwise the system will provide a warning and the action will **not** be approved.
 - Special conditions of appointment, if any, should be noted in the comments section of the Final Selection Document.
 - Appointment as Instructor with Special Provisions. (Example: After notification of the award of Ph.D. the title will change to Assistant Professor).
 - Contingent upon the availability of funds.
 - Contingent upon the procurement of an appropriate immigration and/or visa status prior to the effective date of the appointment and maintenance of an appropriate status for the duration of the appointment.
 - Certification by the Departmental Equal Opportunity Officer (EPA EEO) and the Director/Chair/Dean that the recruitment and selection activities conform to the principles and objectives of the Equal Opportunity Plan is required.
 - For requisitions created to hire more than one individual from the same applicant pool, the number of available positions will be reduced with each final that is submitted. The requisition will be marked closed when the last final is completed.
 - For declined offers, **if** additional finalists were identified in the Interim Selection Document, the department would submit a new Final Selection Document for the alternate candidate.

EPA Recruitment & Selection: Final Selection Document

2. Non-Selection Reason Codes

- 1 – Withdrew candidacy
- 2 – Unavailable for interview
- 3 – Accepted another position
- 4 – Not enough related experience
- 5 – Candidate did not meet advertised qualifications
- 6 – Inadequate communication skills
- 7 – Not prepared for the interview
- 8 – Declined the position
- 9 – Other candidates had more relevant experience
- 10 – Other (explain)

3. Reactivate Recruitment

Click on EPA Recruitment Web Home

- Department - Enter the department number
- Recruitment Status – select CLOSED
- Click on SEARCH or press Enter on keyboard

The next screen will provide a list of all Closed Recruitments for department

- Select the Recruitment ID# to reactivate
- Click on Search or Press Enter on keyboard

The next screen is the View Applicants screen

- Click on Reactivate

The next screen is Reactivate Recruitment

- Reset Posting Period – No or Yes (if want to readvertise)
- Justification – provide justification information in text box

EPA Recruitment & Selection: EPA Web Actions

V. EPA Web Actions

The following actions should be entered into EPA Web (use appropriate EPA Web process, depending on type of appointment).

- Administrative/Secondary Appointments – should be entered into EPAWeb
- Distinguished Professorships – provide the official name of the professorship in the Comments Section
- Acting/Interim Appointments – provide an explanation in the Comments Section
- Salary/FTE Changes (EPA Non-Faculty salaries are approved in Position Management)
- Changes in Effective Dates – provide the correct effective dates in the Comments Section

VI. EPA Recruitment & Selection: Nepotism

- No family member may occupy a position that has influence over another's employment, transfer, promotion, salary administration, or other related management or personnel consideration. If relatives are considered for employment, it is necessary for the department head to complete a certification form verifying that such action will not violate the UNC-CH policy on Nepotism.
- Hiring units are required to submit a completed Nepotism Certificate stating that the University's Nepotism Policy has not been violated whenever related individuals are considered for employment in the same unit. The certification form can be attached to the EPA Web New Employment Action.
- The policy may be viewed on the UNC Policy Manual website under the Employment of Related Persons (Anti-Nepotism Policy) section:
<http://intranet.northcarolina.edu/docs/legal/policymanual/300.4.2.pdf>

EPA Recruitment & Selection: Waiver of Recruitment

VII. Waiver of Recruitment

The **Create Waiver action** is used in cases where the department has a reason or need to hire outside of the formal recruitment process. Waivers are considered and approved as **exceptions** when the absence of a search does not impact equity; and the search request meets the following requirements:

- Under special circumstances, when it can be demonstrated that the absence of advertisements and a regular search do not conflict with achieving equity and locating the person who best meets the University's standards, provided certain conditions are met, advertisements may be omitted.
- Advertising and search requirements may be waived in the case of individuals who possess credentials that the recruiting unit believes makes them best qualified for a particular position and whose appointment would bring unique skills, perspectives, and experience to the University not currently available and unlikely to be available in a timely way following normal advertising and search procedures.
- Individuals whose appointments "would bring unique skills to the University" as noted above can include the following: (1) outstanding professional achievement or (2) women and minorities where there is under-representation in the department and the appointment would add to the diversity of the department; (3) spouses of successfully recruited candidates, where the timing of the negotiations with the successfully recruited candidate requires the immediate ability to respond to the candidacy of the spouse for the position in question.
- Advertising and search requirements may be waived in the case of emergency appointments, where academic departments and administrative units need to make an appointment to meet an unforeseen personnel emergency, for example, death, medical incapacitation, or immediate resignation of a current employee.
- The Faculty and Non-Faculty - [Special Search Policy for EPA Appointments](https://ccm-contrib-dev.unc.edu/ccm/groups/assets/@hr/@eqempopp/documents/content/ccm1_031978.pdf) can be viewed at: https://ccm-contrib-dev.unc.edu/ccm/groups/assets/@hr/@eqempopp/documents/content/ccm1_031978.pdf

To process a waiver request:

- Submit the Waiver of Recruitment Form in RecruitmentWeb

• ***EPA Recruitment & Selection: Waiver of Recruitment***

To process a waiver request:

- Submit the Waiver of Recruitment Form in RecruitmentWeb
- Attach a written letter of justification
- Attach Resume/CV of the Selected Candidate
- EPA Non-Faculty – provide the approved position number

VIII. Employment Pursuant to Grant

Exceptions to the normal Equal Opportunity search requirement may be granted with respect to the employment of persons who are identified as principal investigators or co-principal investigators on grant applications by submitting a Waiver of Recruitment Action when the following requirements are met:

- Such exceptions, if granted at all, are limited to the employment of those identified as principal investigators or co-principal investigators in the grant application who are already at the University of North Carolina at Chapel Hill as postdoctoral research associates, clinical fellows, or other similar titles in this category, at the time of submission of the grant application and who are proposed in the grant application to be employed by the university in non-tenure track EPA positions only.
- The department must certify that the submission of the application and proposed employment are based on the academic merits of the application and not on any impermissible considerations.
- The approval of the exception to the search requirement and the employment itself shall be conditioned upon the successful award of the grant application.
- The employment of an individual for whom an exception is granted shall be limited to the duration of the grant.
- The Faculty and Non-Faculty - [Special Search Policy for EPA Appointments](https://ccm-contrib-dev.unc.edu/ccm/groups/assets/@hr/@eqempopp/documents/content/ccm1_031978.pdf) can be viewed at: https://ccm-contrib-dev.unc.edu/ccm/groups/assets/@hr/@eqempopp/documents/content/ccm1_031978.pdf

EPA Recruitment & Selection: Employment Pursuant to Grant

IX. Waiver of Recruitment - Pursuant to Grants

With the implementation of Recruitment Web - Certain Employment Pursuant to Grant requires the following information:

- Submit the Waiver of Recruitment
 - EPA Non-Faculty - provide the approved position number
- Written letter of Justification - within the body of the letter include:
 - Name of Granting Agency
 - Title of Project
 - Project Period
 - Employee's role (PI, Co-Pi, etc)
- Resume/CV of the Selected Candidate

EPA Recruitment & Selection: Postdoctoral Fellow Appointments

X. Postdoctoral Fellow Appointments

- The following describes the procedures for appointing a Postdoctoral Fellow to a Research Associate. The Faculty and Non-Faculty - [Special Search Policy for EPA Appointments](https://ccm-contrib-dev.unc.edu/ccm/groups/assets/@hr/@eqempopp/documents/content/ccm1_031978.pdf) can be viewed at: https://ccm-contrib-dev.unc.edu/ccm/groups/assets/@hr/@eqempopp/documents/content/ccm1_031978.pdf.

This method ensures that the University's equal opportunity guidelines will be met. Appointing units will still be required to ensure that individuals appointed under this procedure represent the diversity that characterizes the postdoctoral pool at the University. The UNC Equal Opportunity Office will review these appointments annually and report to the Vice Chancellor for Research and Economic Development whether the University's diversity goals are being adhered to in these appointments. Below are the steps to be taken:

- Request a [New EPA Non-Faculty Position](#) by submitting a Create Position action using the Position Management menu in the EPAWeb Personnel Action System. The position creation process must be used both for permanent and temporary positions, whether full- or part-time and regardless of FTE. All position requests will route to the appropriate next level Dean/Division office and then to the EPA Non-Faculty Human Resources unit in the Office of Human Resources for further review and approval. This request must be approved before proceeding to the next step. Questions about creating a position should be directed to the EPA Non-Faculty Human Resources Office at (919) 962-2897 (for more information, please refer to [EPA Non-Faculty Policies, Procedures and Guidelines](http://hr.unc.edu/policies-procedures-guidelines/epa-non-faculty-policies/index.htm): (<http://hr.unc.edu/policies-procedures-guidelines/epa-non-faculty-policies/index.htm>) specifically under the Position Classification and Maintenance section, see [Creation or Modification of EPA Non-Faculty Positions](http://hr.unc.edu/policies-procedures-guidelines/epa-non-faculty-policies/epa-nf-classification/CCM1_028443)). (http://hr.unc.edu/policies-procedures-guidelines/epa-non-faculty-policies/epa-nf-classification/CCM1_028443).
- Prepare request letter with appropriate information pertaining to the postdoctoral fellow proposed for appointment to research associate including the Position ID Number assigned by EPA Non-Faculty Human Resources Position Management (sample letter below):

EPA Recruitment & Selection: Postdoctoral Fellow Appointments

Postdoctoral Fellow Appointments (Con't):

- Complete a *Waiver of Recruitment* in EPA RecruitmentWeb. Attach copies of a signed justification letter and current CV/Resume of selected candidate to this wavier request. Request(s) will route through the appropriate administrative channels to the Equal Opportunity/ADA Office for review by Ms. Ann E. Penn.
- Prepare the necessary EPAWeb action in the EPAWeb Personnel Action System attaching the required personnel documentation. See [EPAWeb Supporting Documentation Transmittal Guidelines](http://hr.unc.edu/policies-procedures-guidelines/epa-non-faculty-policies/epa-nf-records/CCM1_018394): http://hr.unc.edu/policies-procedures-guidelines/epa-non-faculty-policies/epa-nf-records/CCM1_018394.

Sample letter for submission to the Equal Opportunity / ADA Office

2. Submit Memorandum on Departmental Letterhead

MEMORANDUM

TO: Ann E. Penn
Equal Opportunity Officer

FROM: **NAME**

TITLE:

DATE:

RE: **Appointment of Postdoctoral Fellow to Research Associate
EPA NF Position #: _____**

The Department of **NAME** requests permission to appoint **NAME OF POSTDOCTORAL FELLOW** to a Research Associate position in **NAME OF UNIT** under the provisions of the University's Special Search Policy for Certain EPA Faculty and EPA Non-Faculty Appointments.

1. **NAME OF POSTDOCTORAL FELLOW**
2. **DISCUSSION OF SPECIAL SKILLS HELD BY THE POSTDOC TO BE EMPLOYED IN THIS POSITION**
3. **WHERE APPLICABLE, A STATEMENT OF SUPPORT FROM THE HEAD OF THE UNIT.**

Signatures:

Director of Research Unit

Chair of Department

Dean of School

SEARCH COMMITTEE CHECKLIST

APPENDIX A

SEARCH COMMITTEE CHECKLIST

To help search committees prepare for and conduct a successful search, this checklist has been prepared to address the various components of this process: establishing the committee, organizing the search, advertising the position, developing selection criteria, communicating with applicants/candidates, selecting interviewees, conducting interviews and selecting final candidates. Making sure each aspect has been satisfactorily addressed will help the work go smoothly and ensure a lawful search. If you have any questions regarding the checklist please contact the [Equal Opportunity/ADA Office](#).

Establishing the Committee

- _____ Appointment of search committee chair and committee members by the hiring official, dean, department chair or designee
- _____ Charge to the search committee by the hiring official
- _____ Identify tasks to be completed by the search committee
- _____ Complete Online Search Committee Training Module
- _____ Establish search committee meeting schedule
- _____ Post meeting notices as required by the NC Open Meetings Law
[Open Meetings Submission Form](#)
- _____ Review expectations of confidentiality and attendance at committee meetings
- _____ Appoint a search committee recorder responsible for documenting meetings, keeping records of decisions
- _____ Develop budget, including advertising and travel expenses for candidates and committee members

Organizing the Search

- _____ Develop or review position description with the department/unit head and all members of the search committee
 - Identify essential and marginal job functions for the position
 - Identify required and preferred qualifications
- _____ Faculty or staff members participating on a search committee for the first time should complete the EPA RecruitmentWeb Training for Search Committee Members
- _____ Chairperson should review EPA RecruitmentWeb highlights and process flow reminders with Search Committee members when developing recruitment plan
- _____ Ensure position description contains only job related criteria and does not reflect bias or unlawful discrimination based on race, color, religion, sex, age, national origin, sexual orientation, disability, marital status, citizenship, or status as a veteran
- _____ Develop a timeline for the search, including application deadline, interview schedule and target dates for submitting recommendations

_____ Determine materials to be submitted by applicants and how they will be evaluated

- Cover letter
- Curriculum vitae or resume
- Letters of recommendation
- List of references
- Transcripts
- Statement of philosophy, goals
- Other

_____ Address all equal opportunity/affirmative action procedures

- Review advertisement language, sources, and posting duration
- Ensure inclusion of EOE statement in all postings
- Develop a recruitment strategy to ensure a diverse and talented pool of applicants
- Create requisition in RecruitmentWeb prior to posting advertisements or announcements
- Submit Interim Selection Document to the Equal Opportunity/ADA Office for approval prior to scheduling or conducting interviews
- Submit Final Selection Document the Equal Opportunity/ADA Office for approval prior to making job offer to final candidate(s)

Advertising the Position

_____ Identify name, phone number or email address of the department contact for the position

_____ Identify appropriate national, regional and local recruiting market for the position

_____ Identify individuals, institutions, websites, publications and other sources to receive position announcement

_____ Make sure the advertisement includes all required information and has the appropriate approvals

Selection Criteria

_____ Develop and use selection criteria based on the position description

_____ Make criteria as objective as possible, do not include any information that would exclude an individual on the basis of race, color, religion, sex, age, national origin, sexual orientation, disability, marital status, citizenship, or status as a veteran

Communicating with Applicants/Candidates

_____ Email acknowledgement will be sent automatically to all applicants

_____ Send an invitation to apply to all nominated individuals

_____ Communicate with all applicants in a courteous and timely manner

_____ Keep applicants informed on the progress of the search

_____ Maintain confidentiality of applicants to the extent possible

- _____ Review guidelines for questions that can and cannot be asked of applicants
- _____ Notify candidates before conducting reference or employment check

Selection of Interviewees

- _____ Develop and utilize objective criteria for screening vitae or resumes; and maintain timely documentation of the status of all applicants
- _____ Based on a review of materials submitted by applicants, identify those who do and do not meet the minimum qualifications; consider transferability of skills and experiences (e.g. use a matrix)
- _____ Ensure that all applicants are evaluated on the basis of pre-established criteria related to the position. Avoid comments, either orally or in notes that are not job related
- _____ Determine persons to be interviewed, if there is not appropriate representation of target groups; consider methods to identify additional qualified candidates
- _____ Note targeted group members that were screened out of the pool and ensure they were given serious consideration

Conducting Interviews

- _____ Develop and design a plan and schedule for the interview process and campus visits being careful to avoid bias or unlawful discrimination
- _____ Identify all persons and groups to be involved in the interview process
- _____ Develop specific job-related questions to ask each candidate. All candidates should be asked the same questions, allowing for individualized follow-up questions as needed
- _____ Develop interview rating sheets and disseminate to all interviewers
- _____ Evaluate candidates on their qualifications and the full range of their strengths and experiences

Selecting Final Candidates

- _____ Document all decisions, comparing credentials and qualifications of the excluded candidates to the finalist(s)

Record Retention

- _____ Search Committee documentation should include:
 - Materials submitted by each applicant
 - Evaluation of search materials
 - Search committee feedback and notes made during interviews
 - Copies of all ads
 - Summary of search committee meetings
 - Name, position, and title of each search committee member
- _____ Search committee records should be maintained for three (3) years.

RECRUITMENT RESOURCES

APPENDIX B



National Minority Faculty ID Program Southwestern University

The UNC-Chapel Hill Equal Opportunity Office has purchased a membership subscription to the National Minority Faculty ID Program. The National Minority Faculty Identification Program sponsored by Southwestern University is a tool designed to help connect minority faculty with institutions of higher education. Member institutions have access to search the database for qualified minority candidates and post their job openings. Candidates enter their name and information into the database and then search for available jobs posted by member institutions. The program runs the academic year (August-May).

Departments wishing to use this resource can access the website at <http://www.southwestern.edu/natfacid/>. There is no additional charge for posting job announcements or searching the database. Please contact the Equal Opportunity Office at 966-3576 for the login username and password. Instructions on posting a job opening and searching the candidate database are on the main page of the website.

Selected Diversity Recruitment Resources

Departments are encouraged to list their positions on websites and list serves specific to their department or position. In addition, below are some additional resources that may be helpful in your search.

American Association of University Women

<http://www.aauw.org>

1111 Sixteenth St. N.W.
Washington, DC 20036
(202) 785-7774
E-mail: ads@aauw.org

American College Personnel Association

<http://www.acpa.nche.edu>

One Dupont Circle N.W.
Washington, DC 20036-1110

Insight Into Diversity

www.insightintodiversity.com

225 S. Meramec Avenue
Suite 400
St. Louis, Missouri 63105
(314) 863-2900, (800) 537-0655
Fax (314) 863-2905

The American Educational Research Association

<http://www.aera.net>

1230 17th Street, N.W.
Washington, DC 20036-3078
(202) 223-9485

Diverse Issues in Higher Education

www.diverseeducation.com

10520 Warwick Avenue, Suite B-8
Fairfax, VA 22030

Women in Higher Education

www.wihe.com

1934 Monroe Street
Madison, WI 53711

The Hispanic Outlook in Higher Education

www.hispanicoutlook.com/

GUIDELINES FOR ASKING QUESTIONS ?

APPENDIX C

PRE-EMPLOYMENT GUIDELINES

This chart provides important legal guidelines for inquiries that are permissible during the interview and recruitment phase, and those that must be avoided to comply with anti-discrimination laws and to reduce legal liability. Any inquiry should be avoided that, although not specifically listed herein, is designed to elicit information as to any applicant’s **race, color, national origin/citizenship, age, sex, religion, or disability**, unless it is a Bona Fide Occupational Qualification (BFOQ). Please review this closely and carefully prior to any screening or interviewing activities. Please call the Equal Opportunity Office (919-966-3576) with any questions.

<i>SUBJECT</i>	<i>PERMISSIBLE INQUIRIES</i>	<i>INQUIRIES THAT MUST BE AVOIDED</i>
Age	Only inquiries related to minimum age requirements set by law; if required as a Bona Fide Occupational Qualification (BFOQ).	Requirement that applicant state age or date of birth. ”How old are you?” “We are looking for someone who can relate with younger students.” To request applicant produce proof of age (birth certificate, baptismal record).
Criminal & Background Checks	Permissible to ask about convictions for crimes that bear a direct relationship to the job. Consult y with Equal Opportunity Office if any concerns in this area.	Asking for disclosure of arrest, or any inquiry related to arrest. To look into criminal background without express written consent from candidate.
Citizenship, Birthplace	(a) Permissible: “If hired, would you be able to show proof of authorization to work in the U.S.?” (b) For verifying authorization <u>after</u> being hired, applicants must be allowed to <u>choose</u> from any of the approved forms of proof available on the I-9 form (all new hires).	(a) Asking if the person “has a green card.” (b) Date of citizenship. (c) Asking for proof of citizenship or work authorization <u>before</u> hiring (done after offer). (d) Whether spouse or parents are naturalized or native-born U.S citizens.
Dependents	None.	Inquiries regarding: the number and ages of children; what child care arrangements have been made; family planning.
Disability (has an	Permissible: “Can you perform the essential	(a) If the applicant has a disability, has ever been hospitalized,

impairment that substantially limits a major life activity; a record of such, or is regarded as having an impairment.)	functions of the job with or without an accommodation?" Persons with disabilities can be tested in the pre-offer stage, but only if all applicants are tested.	formerly used or been addicted to illegal drugs or alcohol, treated for mental illness, or filed worker's compensation claim. (b) To ask for medical examinations or any disability related information. (c) To impose an accommodation upon a candidate that has not specifically asked for one.
Marital and Family Status/Pregnancy	None at the pre-employment stage. Is there any reason you cannot work evenings or week-ends if needed?	To ask if applicant is: single, married, divorced, widowed, etc.; Mr., Mrs., Miss, Ms. (ok after hire for tax purposes). Inquiries regarding the names and ages of spouse or children. Any inquiry concerning pregnancy.
Military Service	Any job related experience. Type of education and experience in the U.S. Armed Services as it relates to a particular job.	(a) Military or reserves service records. (b) Military service for any country other than U.S. (c) Type of discharge.
Name	For access purposes, whether applicant's work or research records are under another name. Permissible: Is any additional information relative to change of name necessary to enable a check of your work and educational record?"	Inquiries about the name that would indicate applicant's lineage, ancestry, national origin, or descent. Inquiry into previous name of applicant where it has been changed by court order or otherwise. To ask if a woman is called by Miss, Mrs., or Ms., or to ask for her maiden name.
National Origin	Languages, travel or cultural experiences as they relate to job requirements.	(a) Birthplace of the applicant, parents, grandparents, or spouse. (b) Any other inquiry into national origin or ancestry.
Professional Associations	Inquiries regarding memberships in job-related clubs and organizations. Applicants may omit those that reveal the race, religion,	Requesting the names of all organizations, clubs, and associations to which the applicant belongs. Inquiries regarding how the

	age, sex, disability, etc. of applicant.	applicant spends his/her spare time.
Race, Color	None.	Any inquiry directly or indirectly that would indicate race or color, including color of eyes, hair, skin, or other feature.
Religion or Creed	None. After hiring, it is permissible to discuss accommodations for religious practice, if an accommodation is requested by the employee.	(a) Recommendations of references from church officials. (b) Any inquiry that would indicate religion or creed, such as “What religious holidays do you observe?” or “What church do you go to?”
Retaliation	None.	Have you ever brought charges or filed a grievance against a former employer?
Sex	None.	Any inquiry that would indicate sex, unless a bona fide occupational qualification (BFOQ). To ask if applicant is expecting, planning a family or uses birth control.
Sexual Orientation	None.	Any inquiry concerning an applicant's heterosexuality, homosexuality or bisexuality.

This information has been compiled from resources provided by the Equal Employment Opportunity Commission (EEOC). Prepared by the Equal Opportunity Office, University of North Carolina Chapel Hill. June 2009.

TRAINING

APPENDIX D



THE UNIVERSITY
of NORTH CAROLINA
at CHAPEL HILL

Please select the training program by clicking your choice below:

[*Preventing Sexual Harassment*](#)

[*Preventing Employment Discrimination*](#)

[Search Committee Training](#)

All hiring supervisors, search committee chairs and members should complete the Online Training Module before beginning the search process.

[EPA RecruitmentWeb Computer Based Training \(CBT\)](#)

This training is designed for HR Facilitators and includes demonstrations on:

- Logging into HR Central.
- Using EPA RecruitmentWeb.
- Using the HR Inbox and other tools related to EPA RecruitmentWeb.

[EPA RecruitmentWeb Computer Based Training \(CBT\) for Search Committees](#)

This training is designed for all Search Committee Members, who are able to review applications and participate in the selection process for particular requisitions. Search Committee Members have access to review basic applicant data and submitted documents (CV/Resume, Cover Letter, etc). In addition to the HR Facilitator, a Search Committee Chair is granted access to directly update and submit the selection documents.

Topics covered in this training include:

- Logging into HR Central.
- Using EPA RecruitmentWeb.

SAMPLE LETTERS

Appendix A. Sample: Request for Referral Letter

[DATE]

[ADDRESS]

Dear **[NAME]**:

The University of North Carolina at Chapel Hill and the [Department] seeks candidates for **[POSITION]**. Due to your reputation and knowledge of high-caliber individuals, we would appreciate your assistance with the recruitment process. We seek candidates who present diverse experience and value interactions with persons from different backgrounds. Especially welcome are candidates who have experienced cultures other than their own; who can demonstrate effectiveness with a diverse community; and who have shown interest in incorporating multicultural understanding in their work.

[SHORT DESCRIPTION OF JOB]. A job description is enclosed.

You will find a listing of all job openings on the [Careers at Carolina](http://hr.unc.edu/careers-at-carolina/index.htm) website: (<http://hr.unc.edu/careers-at-carolina/index.htm>).

[OPTIONAL: INSERT IF USING A SEARCH FIRM] For this search, the university is working with **[FIRM NAME]**, a retained executive search firm, **[FIRM DESCRIPTION]**. The firm can be reach through **[CONTACT INFORMATION]**.

If you know of a person who might be interested in this position, I can be reached at **[TELEPHONE]**, or the person may apply directly using the contact information on the website. Your assistance with this search is greatly appreciated.

Sincerely,

[NAME]
[CHAIR/MEMBER] of Search Committee
[TITLE]

Appendix C. Sample Letter: Application Rejection Letter

[DATE]

[ADDRESS]

Dear **[NAME]**:

Thank you for your response to our recent advertisement for the position of _____ . We appreciated the opportunity to review your credentials and were pleased that you are interested in employment with The University of North Carolina at Chapel Hill.

We have narrowed our search to those few applicants who have the specific qualification and experience we need for this position. Although your credentials do not specifically meet our current needs, we invite you to view our [Careers at Carolina](http://hr.unc.edu/careers-at-carolina/index.htm) website: (<http://hr.unc.edu/careers-at-carolina/index.htm>) to learn about other employment opportunities at The University of North Carolina at Chapel Hill.

Thank you again for your interest. We wish you the best of luck in your job search.

Sincerely,

[NAME]

Chair, Search Committee

Appendix D. Sample Letter: Letter Following Telephone Interviews

[DATE]

[ADDRESS]

Dear **[NAME]**:

Thank you for your response to our recent advertisement for the position of _____.

We appreciate the opportunity to speak with you by telephone to review your credentials and were pleased that you were interested in employment with UNC-Chapel Hill.

We have narrowed our search to those few applicants who best meet the specific qualifications and experience we need for this position. Although your credentials are impressive, we regret to inform you that you are not among those selected for the next round of consideration.

Thank you again for your interest. We wish you the best in your job search.

Sincerely,

[NAME]

Chair, Search Committee

Appendix E. SAMPLE: TELEPHONE REFERENCE CHECK FORM

Applicant's Name: _____

Company Contacted: _____

1. When did the applicant work for your company?
From: _____ To: _____

2. What was the applicant's position/title? _____

3. What information can you give concerning?

Quality of work?

Dependability?

4. Did this person get along well with others? Yes No

5. Why did he/she leave your employment?

6. What are the strengths of applicant?

7. What are some areas that need further development?

8. Did the applicant supervise other employees? If yes, how many?

9. How does the applicant handle conflict or confrontational situations?

10. Is he/she eligible for rehire with your company? Yes No

If not, why not? _____

Additional Comments:

Information from:

Title: _____

Reference Check made by: _____

Date: _____

Appendix F. SAMPLE: Applicant Appraisal Form

Name of Applicant: _____ Date: _____

Position: _____

Interviewer: _____ Division: _____

Rate applicants based on criteria below from 1 (lowest) to 10 (highest). Please comment on the following items Rate from 1 to 10:

Knowledge and Experience – How does previous knowledge and experience relate to current open position?

Mental and Physical Capabilities as they relate to this job – Verbal ability, judgment, analytical, logical, decisive, resourceful, imaginative, can/cannot meet specific physical requirements of this job. Explain.

Interpersonal Skills – Does applicant communicate with credibility and confidence?

Supervision and Management Experience – Discuss in-depth management training and experience, including managing a diverse workforce.

Rate Applicant on other factors relevant to this job. Other factors must be specified before interview. Other:
