# 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 and Compliance (EOC) 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://eoc.unc.edu/.
I. PEOPLEADMIN SYSTEM

PeopleAdmin is a web based recruitment and applicant tracking system that was 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 system include:

- Online recruitment posting 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 ethnicity, race, and gender data, attachment of curriculum vitas (CVs) or resumes as appropriate, cover letters and up to 10 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 reviews and selection and hiring proposals including all EPA EEO documentation.
- Integration with the Position Management component for EPA Non-faculty.
- Vacancy ID – Random system generated numbers in PeopleAdmin that are used to identify recruitment postings. The Vacancy ID replaces the Recruitment ID (Rec ID) formerly used in the RecruitmentWeb system.
- Position Numbers – Randomly generated numbers in position management used to identify EPA Non-Faculty positions. Position numbers can also be used to identify EPA Non-Faculty positions in PeopleAdmin.
- 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.
II. INITIAL APPOINTMENTS

Once a vacancy for an EPA Faculty, Non-Faculty or Postdoctoral Scholar position occurs, a Recruitment Posting should be created and routed through PeopleAdmin 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.

- Search procedures apply to all permanent and temporary EPA Faculty, Non-Faculty and Postdoctoral Scholar recruitments.

- Two routing stops are required for EPA postings. The Department HR Representative will initiate the Posting and submit it to the EEO School/Division Approver. They will review and approve all postings for their unit and submit them to Equal Opportunity and Compliance Office. The Equal Opportunity and Compliance Office will be the final routing stop for all EPA Postings actions.

- Multiple positions with the same qualifications/requirements can be recruited for on the same posting. For EPA Non-Faculty jobs, only 1 position number from Position Management is needed to initiate a posting.

- For detailed instructions on how to complete the Recruitment Posting form, please view the UNC (PeopleAdmin) User Guide at: https://hrisguide.unc.edu/uncpa-help/

III. 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.

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

IV. EPA NON-FACULTY POSITIONS

- EPA Non-Faculty positions must be created and active in position management prior to initiating a recruitment posting.
• 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 imported into PeopleAdmin from Position Management and may not be edited within the recruitment posting. To change any of these fields a modification will need to be submitted and approved in EPA Web. You can then contact the Equal Opportunity and Compliance Office to make the edits in PeopleAdmin. Prior to initiating a recruitment posting for all EPA Non-Faculty positions, the department should review these fields in position management to determine whether or not updates are necessary.

V. POSTING PROCESS

A. POSTING PERIODS

• **Tenured/Tenure Track positions** – must be advertised *nationally* for a minimum of **30** days.

• **Administrative Appointment with Faculty Rank** (Example: Provost, Deans, Chair) – must be advertised *nationally* for a minimum of **30** days.

• **Fixed-Term Faculty** – must be advertised *locally and regionally* for a minimum of **14** 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 **14** days and must appear in UNC-CH Employment Opportunities, unless the Equal Opportunity and Compliance Office approves a request for a shorter period.

• **Senior level positions** must be advertised regionally with selected positions advertised nationally (Example: Vice Chancellor’s, Directors, and Deans) for a minimum of **14** days.

• **All Temporary positions and Postdoctoral Scholar positions** must be advertised for a minimum of **3** days. These positions can be advertised for longer periods as determined to be necessary by the hiring department.

• 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 Positing Period
  - 1 year from the initial posting date;
  - Expectation that after 1 year departments will close existing postings with little to no activity; or
  - Close existing postings and initiate a new posting to replace the outdated posting; or
  - Submit a request to the Equal Opportunity and Compliance Office to extend the posting.

B. ADVERTISEMENT GUIDELINES

*Advertisement samples need to be attached* to the Posting action on the Posting Specific Documents screen 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, affirmative action employer and welcomes all to apply, including protected veterans and individuals with disabilities.*”
  - The advertisement should include the Quick Link URL: [http://unc.peopleadmin.com/postings/xxxxx](http://unc.peopleadmin.com/postings/xxxxx) *for the Job Posting.*

C. 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 EOC Office has purchased a membership subscription to the National Registry of Diverse & Strategic Faculty ([www.theregistry.ttu.edu](http://www.theregistry.ttu.edu)), formerly known as the National Minority Faculty ID Program. Please contact the EOC Office for the 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.

D. RECRUITMENT EFFORTS

Special efforts to identify minority and female candidates.

- Identify efforts the department will undertake to reach minority and female populations. Special efforts should be undertaken by the department to identify minority and female candidates when the department is underrepresented in this position for either constituency. (Examples: list professional caucuses, organizations and universities).

- List any special recruitment activities that will be a part of this search. (Example: interviewing at professional meetings)

- Visit the Equal Opportunity and Compliance website for a list of Diversity Recruitment Sources: http://eoc.unc.edu/recruitment/recruitmentresources/.

E. SEARCH COMMITTEE APPOINTMENTS

- A minimum of 3 search committee members is required (internal & external combined). There is no maximum number that can be assigned; however, females and minorities must be represented on the search committee.

- A Search Committee Chair must be identified – you may have 1 or 2 individuals assigned as chairs (internal & external combined).

- If no females or no minorities are included on the search committee, the department is required to contact the Equal Opportunity and Compliance Office to provide an explanation/justification. 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 – To add internal search committee members you can search on their name or email address to see if they previously served on a committee. If you are adding them to a committee for the first time you will need to enter their name, email address and PID information in the search field.

- SPA employees may serve on EPA 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 at least once before beginning the search process. The module can be accessed at http://www.unc.edu/depts/eooada/sct/index.htm/ or from the Equal Opportunity and Compliance Office web site at http://eoc.unc.edu/training/for-employee-recruiters/.

**F. SUPPLEMENTAL QUESTIONS**

• **Adding New Supplemental Questions**: Click on the button labeled "Add a Question." A pop up section will appear where you can add an existing question or create a new one.

• **Adding Existing Supplemental Questions**: There are two ways to search for approved posting questions to add to the job being posted. You can filter using the key word search or filter by question category.

• **Assign Points or Disqualifying Responses**: Click on the question that has been added and a dropdown menu will appear where points and disqualifying responses can be associated to the supplemental question.

• **Supplemental Question Options**: Once questions have been added to the posting, you will see a column of checkboxes to the left of each question; checking these boxes will make a question required.

**G. MODIFYING A RECRUITMENT POSTING**

To Modify a Faculty or Postdoctoral Scholar recruitment once it is Posted, or to extend the posting period *contact* the Equal Opportunity and Compliance Office. For EPA Non-faculty positions to edit any of the information that is fed to PeopleAdmin from EPA web, you will first need to submit a modify action in EPA Web. Once that is approved you can contact the Equal Opportunity and Compliance Office to modify the posting in PeopleAdmin.

The only fields that may *not be modified* are the Supplemental Questions if they are used. Once a requisition is completed and posted to the applicant website, these questions *cannot* be changed.

**H. INTERIM REVIEW & NON-SELECTION CODES**

The Interim Review should be submitted:
- after the application deadline,
- after the minimum posting period (30 or 45 days) and
- before interviews are offered to candidates.

The Interim Review is processed by updating the applicant workflow statuses and routing the Posting for approvals.

Exceptions to this policy require prior discussion and written approval from the Equal Opportunity and Compliance Office.

- Non-Selection Reason Codes

1 – Withdrew from consideration
2 – Accepted an offer outside University
3 – Selected for another University position
4 – Applicant is unable to meet position scheduling requirements
5 – Application review shows lack of directly related skills and abilities
6 – Application review shows sufficient skills and abilities but less than selected candidate
7 – Applicant does not met essentials skills requirements posted
8 – Application presentation is inconsistent with position requirements
9 – Other (open text box provided)

- Either the Department HR Representative or the Search Committee Editor may update selections for interview and reasons for non-selection.

- Only the Department HR Representatives are allowed to submit the Interim Review for approvals.

- Applicant status changes may be made by contacting the Equal Opportunity and Compliance Office.

- As noted above, the Interim Review may be submitted multiple times as candidates apply and are invited to campus for interviews.

- All applicants listed as remaining under review consideration do not have to be interviewed. Submitting an extended list initially may prevent the unit from having to later submit an updated Interim Review to request permission to interview additional applicants that may have been previously excluded.

- Certification by the Departmental Equal Opportunity Officer (Department EEO Approver) and the School/Division HR Approver that the recruitment and selection activities conform to the principles and objectives of the Equal Opportunity Plan is required. Please note: Department HR Representatives cannot approve for both the Department HR Representative role and the Department EEO Approver role on the same Interim Review action.
I. SELECTION AND HIRING PROPOSAL

- When a candidate has been Recommended for Hire, the Selection and Hiring Proposal is completed. All excluded candidates must have a non-selection reason code indicated. Candidates still under consideration as a finalist do not need an exclusion code.

- The recommended salary an EPA Non-Faculty position must be within the range approved in the requisition; otherwise the Selection and Hiring Proposal action will not be approved.

- Special conditions of appointment, if any, should be noted in the comments section of the Selection and Hiring Proposal.
  
  ➢ 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 (Department EEO Approver) and the School/Division HR Approver 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, a Selection and Hiring Proposal must be submitted for each candidate Recommended for Hire.

- For declined offers, if additional finalists were identified in the Interim Review; the department would update the applicant workflow to Recommended for Hire and submit a new Selection and Hiring Proposal for the alternate candidate.

J. 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

K. 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](http://intranet.northcarolina.edu/docs/legal/policymanual/300.4.2.pdf)

VI. 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 can be viewed at: https://ccm-contrib-dev.unc.edu/ccm/groups/assets/@hr/@eqempopp/documents/content/ccm1_031978.pdf

List of Waiver Types:

- Unique Qualifications
- Employment Pursuant to Grants
- Post Doc to Research Associate
- SPA to EPA Position
- Emergency Appointment
- Spousal Hire
- Targeted Hire
- Minority Hire
- Other

To process a waiver request:

- Submit the Waiver of Recruitment in PeopleAdmin.

To process a waiver request in PeopleAdmin:

- Complete the required fields on the Posting Information screen in PeopleAdmin.
- Proceed to the Waiver Information screen and answer yes to the questions: Is a posting waiver requested for this position?
- Complete the required fields on the Waiver Information screen.
- Go to the Posting Specific Documents screen and attach the following:
  - Waiver Justification Letter
Waiver Candidate CV/Resume

Internal Only Search

- A Waiver is considered a type of internal only search because the position is not being advertised externally. A particular candidate is being recommended for hire and that could be an internal or external candidate.

- Another type of internal only search is where a position is posted on the UNC Careers at Carolina web page and qualified internal candidates are able to apply. However, this position is not advertised externally. It will usually be pre-determined that there is a diverse pool of qualified candidates available to apply. The instructions on the PeopleAdmin system make it clear that Departments need to get prior approval from the EOC Office prior to initiating a recruitment as an Internal Only Search.

A. EMPLOYMENT PURSUANT TO A 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 can be viewed at: https://ccm-contrib-dev.unc.edu/ccm/groups/assets/@hr/@eqempopp/documents/content/ccm1_031978.pdf
B. 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 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 Equal Opportunity and Compliance 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) 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).

- Prepare request letter to the Equal Opportunity and Compliance Office with appropriate information pertaining to the postdoctoral fellow proposed for appointment to research associate including the Position ID Number assigned by EPA Non-Faculty Office. (See Appendix D for sample letter.)

- Complete a Waiver of Recruitment in PeopleAdmin. 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 and Compliance Office and EPA Non-Faculty Office.
- 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.

C. TARGETED HIRING PROGRAM

As part of a continuing commitment to provide students with a thriving, intellectually stimulating educational environment, a gifted and diverse faculty is essential. That is why the University of North Carolina at Chapel Hill has a Targeted Hiring Program. The purpose of the program is to attract accomplished and talented new faculty members from underrepresented groups for tenure track appointments at the University of North Carolina at Chapel Hill. This may include individuals who grew up in economically disadvantaged circumstances, individuals with substantial professional experience working with minority and economically disadvantaged populations; individuals doing significant research on issues that disproportionately affect minority and disadvantaged populations; and individuals whose teaching or research specialty is in a field that is currently underrepresented in the University faculty.

The Targeted Hiring Program is managed by the Office of the Executive Vice Chancellor and Provost to further campus goals for a more diverse faculty.

This program provides up to full-salary for a period of up to 4 years at the discretion of the Executive Vice Chancellor and Provost. There is no maximum salary for this program; however it is dependent upon the availability of funds at the time of application. It is expected that after the initial four years, the hiring unit will assume fully the support of any faculty member hired under this program.

To apply for these funds:

1. Targeted Hiring faculty candidates generally will be identified outside the usual faculty search mechanism (use of EEO waivers). In special cases, a candidate may be identified through an on-going search; however in that situation a letter to the Executive Vice Chancellor and Provost should explain why the Targeted Hiring faculty candidate was not recommended to the appointing authority by the Search Committee.

2. The candidate must have been interviewed by the department and enjoy the support of the Dean, Department Chair and a preponderance of the departmental or school full professors.

3. A letter should be sent from the Dean and the Department Chair to the Executive Vice Chancellor and Provost with:
a. an articulation of how the proposed hire will advance the educational and/or research missions of the department or school,
b. an evaluation of the qualifications of the candidate,
c. a statement explaining how the candidate was identified and recruited,
d. the vote of the departmental or school full professors accounting for any negative votes or abstentions, and
e. the candidate’s cv

4. The letter to the Executive Vice Chancellor and Provost should specify a tentative salary which would be used in the offer to the candidate. The letter should accompany the signed Targeted Hire Memorandum of Understanding form.

The names of persons who are hired through this Program are generally kept confidential, so as to create a climate of equity among the faculty. Questions about this program should be directed to Executive Associate Provost Ron Strauss (919.962.4510 or ron_strauss@unc.edu).

D. MINORITY HIRING PROGRAM

As part of a continuing commitment to provide students with a thriving, intellectually stimulating educational environment, a gifted and diverse faculty and staff is essential. That is why the University of North Carolina at Chapel Hill has a Minority Hiring Program.

The purpose of the program is to attract accomplished and talented new faculty (fixed term) and EPA staff members from underrepresented groups for appointments at the University of North Carolina at Chapel Hill. This may include individuals who grew up in economically disadvantaged circumstances, individuals with substantial professional experience working with minority and economically disadvantaged populations; individuals doing significant research on issues that disproportionately affect minority and disadvantaged populations; and individuals whose teaching, research, or experience specialty is in a field or department that is currently underrepresented in the University.

The funding for this program is provided by the division or department recommending the candidate.

Minority Hiring candidates generally will be identified outside the usual faculty or staff search mechanism (use of a waivers will be required). In special cases, a candidate may be identified through an on-going search; however in that situation a letter to the Director of the Equal Opportunity and Compliance Office should explain why the Minority Hiring candidate was not recommended to the appointing authority by the Search Committee.

When the Minority Hiring waiver request is submitted through the PeopleAdmin System, the department will need to attach a Waiver
Justification Letter, addressed to the Director of the Equal Opportunity and Compliance Office, along with a CV/Resume.

The names of persons who are hired through this Program are generally kept confidential, so as to create a climate of equity among the faculty and staff. Questions about this program should be directed to Equal Opportunity and Compliance Office (919.966.3576 or equalopportunity@unc.edu).

E. SPOUSAL HIRING PROGRAM

As part of a continuing commitment to provide students and the campus with a thriving, intellectually stimulating educational environment, a gifted and diverse faculty is essential. That is why the University of North Carolina at Chapel Hill has had a Spousal Hiring Program. This program recognizes that success in recruitment often depends on the opportunity to facilitate appointment of an accompanying academic spouse, and the Office of the Executive Vice Chancellor & Provost will assist departments and colleges by providing matching funds in support of such appointments.

Limitations: The program is used to facilitate the employment of spouses of new tenure track or tenured faculty who are being recruited to UNC-Chapel Hill or area universities. This is not a program for spouses of already employed faculty members. The Office of the Executive Vice Chancellor & Provost may alter the limitations of this program as funds are expended or as more funds become available. Please contact the Office of the Executive Vice Chancellor and Provost to determine whether funds are still available before submitting a request.

Program: The program provides funds from the Office of the Executive Vice Chancellor and Provost to assist departments in the appointment of accompanying academic spouses. For purposes of this program, the term "recruited faculty appointee" refers to the individual being recruited and for whom there is an academic spousal appointment assistance issue. "Accompanying academic spouse" refers to a person with appropriate faculty academic credentials who is a qualifying spouse or domestic partner. The terms of the program are as follows:

- the accompanying academic spouse must become a candidate for a position (fixed term or tenure track) and be appointed through the regular university hiring processes;
- the unit which appoints the accompanying academic spouse provides a minimum of one-third (minimum 33 1/3%) of the salary and associated benefits of the accompanying academic spouse;
- the unit which appoints the recruited faculty appointee provides a minimum of one third (minimum 33 1/3%) of the salary and associated benefits of the accompanying academic spouse; and,
the Office of the Executive Vice Chancellor and Provost provides up to one third (maximum 33 1/3%) of the salary and associated benefits for hiring the accompanying academic spouse.

the salary funding for the position to which the accompanying academic spouse is appointed will be provided for three years.

if the accompanying academic spouse leaves this position before the end of the three years, the salary and benefits funding in the position at the time will revert according to the initial proportions indicated above.

the continuation of the appointment of the accompanying academic spouse shall be entirely under the purview of the unit in which that individual is appointed in accordance with all personnel policies and procedures applicable to similar appointments in the unit. The letter of appointment should explicitly state if, beyond the first three years, the position is contingent on the availability of funds from the accompanying academic spouses’ home department.

Approval of funding for a spousal hire under this Policy does not constitute waiver of the requirements of the University Anti-Nepotism Policy. See:

Process: Units should direct requests for program funds in writing by letter to the Executive Associate Provost. Requests must include the following and be endorsed by both units involved:

- a description of the market contexts in which the hiring of the recruited faculty appointee and accompanying academic spouse are to take place; indicate if waiver(s) of EEO requirements are to be used in the hiring.

- the academic purposes served by hiring the recruited faculty appointee and accompanying academic spouse;

- the source(s) of funds to be used by the hiring units to support their portions of the accompanying academic spouse’s salary and benefits.

Requests can be made at any time and will be considered as long as funds are available to support the program. No funds will be provided to a department or college until a memorandum of understanding has been signed by the Office of the Executive Vice Chancellor and Provost and participating units. The Spousal Hiring memorandum of understanding form is located at:http://facultypersonnel.unc.edu/faculty-policies-procedures/recruitment-and-selection/CCM1_017134
Funds provided will revert to the Office of the Executive Vice Chancellor and Provost or the units when the appointment of the accompanying academic spouse ends. The names of persons who are hired through this Program are generally kept confidential, so as to create a climate of equity among the faculty. Questions about this program should be directed to the Executive Vice Provost.

Spousal Hires may be arranged between UNC-Chapel Hill and other area universities.

In the case where the primary hire is in a UNC department, the spousal hire may occur in another university and when this occurs:

- the UNC department making the primary hire provides 1/3 of the spousal salary,
- the Provost of the other area university provides 1/3 of the spousal salary, and
- the spouse's department at the other area university provides 1/3 of the spousal salary.

In the case where the primary hire is at another university, the spousal hire may occur at UNC and when this occurs:

- the department at the other university making the primary hire provides 1/3 of the spousal salary,
- the UNC Provost provides 1/3 of the spousal salary, and
- the spouse's department at UNC provides 1/3 of the spousal salary.

The Office of the Provost may alter the arrangements with other universities as needed for a specific appointment.

**Policy Guidance on Definition of Spouse and Partner Status:**

In administering the Spousal and Partner Hiring Assistance program, the Office of the Executive Vice Chancellor and Provost requires that the accompanying spouse/partner either be legally married to the appointee or a "domestic partner" of this individual. The definition of "domestic partner" is:

- two individuals (regardless of gender) who have reached age 18 or older, who live together in the same residence in a long-term relationship of indefinite duration with an exclusive mutual commitment, who are not married or related to the other by blood or marriage, and who are responsible for each other's welfare and share financial obligations, as evidenced by three of the following types of documentation which should be provided upon request: (a) joint mortgage or lease; (b) designation of domestic partner as beneficiary for life insurance; (c) designation in will of domestic partner as primary beneficiary upon death; (d) domestic partnership agreement; (e) powers of attorney for property and health care; and (f) joint ownership of a motor vehicle, joint checking or savings account, or joint credit account.
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 and Compliance 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 [http://www.unc.edu/depts/eooada/sct/index.htm](http://www.unc.edu/depts/eooada/sct/index.htm)
_____ 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
_____ 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 EEO statement in all postings
- Develop a recruitment strategy to ensure a diverse and talented pool of applicants
- Create requisition in PeopleAdmin system prior to posting advertisements or announcements
- Submit Interim Selection Document to the Equal Opportunity and Compliance Office for approval prior to scheduling or conducting interviews
- Submit Final Selection Document the Equal Opportunity and Compliance 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.
Appendix B: Diversity Recruitment Resources

Historically Black Colleges & Universities (HBCU’s)
U. S. News & World Report 2014 Best Colleges Rankings
(*notable programs)*

Claflin University, Orangeburg, SC
(Music, South Carolina Center for Biotechnology Collaboration)
www.claflin.edu

Delaware State University, Dover, DE
(Neuroscience Research Center)
www.desu.edu

Dillard University, New Orleans, LA
(Institute of Jazz Culture)
www.dillard.edu

Fisk University, Nashville TN
(Natural Science Research)
www.fisk.edu

Florida A&M University, Tallahassee, FL
(Largest producer of black college graduates with doctorates in Engineering & Natural Sciences.)
www.famu.edu
www.eng.fsu.edu
www.law.famu.edu

Hampton University, Hampton VA
(Nanoscience program)
www.hamptonu.edu

Howard University, Washington D.C.
(Medical School, most concentrated group of black scholars in the world.)
www.howard.edu
www.law.howard.edu
www.healthsciences.howard.edu/education/schools-and-academics/medicine

Jackson State University, Jackson MS
(Research Intensive University, biomedical and biological sciences, and teaching degrees.)
www.jsums.edu

Morehouse College, Atlanta, GA
(“Black Ivy League”, First LGBT History in the Black Community Course.)
www.morehouse.edu
www.msm.edu - Morehouse School of Medicine

North Carolina A&T State University, Greensboro, NC
(Sustainable Infrastructure Materials (SIMS) Lab)
www.ncat.edu

Spelman College, Atlanta, GA
(2nd largest producer of college graduates to go on to medical school.)
www.spelman.edu

Tennessee State University, Nashville, TN
(Largest producer of college graduates that go into the agricultural industry.)
www.tnstate.edu

Tuskegee University, Tuskegee, AL
(Nursing, College of Veterinary Medicine, Bioethics and Research programs)
www.tuskegee.edu
www.onemedicine.tuskegee.edu/SVM/SVM.htm
www.tuskegee.edu/academics/colleges/cvmnah/school_of_nursing_allied_health.aspx

Xavier University of Louisiana, New Orleans, LA
www.xavier.edu
www.xula.edu/cop (Pharmacy)

Publications

Diverse Issues in Higher Education – www.diverseeducation.com

  • Woman Engineer
  • Minority Engineer
  • Career & the disABLED
  • Workforce Diversity
  • Hispanic Career World
  • African-American Career World

Hispanic Outlook in Higher Education - www.hispanicoutlook.com

IMDiversity – www.imdiversity.com

INSIGHT Into Diversity – www.insightintodiversity.com
STEMconnector – www.stemconnector.org

The Black Collegian - www.blackcollegian.com

Women in Higher Education - www.wihe.com

Professional Organizations

Alliance of Black Women Attorneys - www.msba.org

American Alliance for Health, Physical Education, Recreation and Dance (AAHPERD) – www.aahperd.org

American Assembly for Men in Nursing – www.aamn.org

American Association of Black Psychologist - www.abpsi.org

American Association of Hispanics in Higher Education (AAHHE) - www.aahhe.org

American Association of University Women - www.aauw.org

American Association of Women Dentists (AAWD) - www.aawd.org

American Indian Science and Engineering Society - www.aises.org

Asend - Pan-Asian Leaders - www.ascendleadership.org

Asian American Journalists Association (AAJA) - www.aaja.org

Asian Pacific Islander American Association of Colleges and Universities (APIACU) - www.apiacu.org

Association for Asian Studies - www.asian-studies.org

Association for Women in Communications - www.womcom.org

Association for Women in Computing – www.awc-hq.org

Association for Women in Mathematics – www.sites.google.com/site/awmmath

Association for Women in Science - www.awis.org

Association for Women in Sports Media – www.awsmonline.org

Association of American Indian Physicians – www.aaip.org
Association of Black Nursing Faculty – www.abnf.net

Association of Black Women Physicians - www.blackwomenphysicians.org

College Language Association – www.clascgikars.org

Institute for Diversity in Health Management – www.diversyconnection.org


National Alaska Native American Indian Nurses Association - www.nanainanurses.org

National Asian Pacific American Bar Association (NAPABA) - www.napaba.org

National Association of Asian American Professionals – www.naaap.org

National Association of Hispanic Nurses - www.nahnnet.org


National Black Nurses Association – www.nbna.org

National Hispanic Medical Association - www.nhmamd.org

National Institute on Minority Health and Health Disparities (NIMHD) - www.nimhd.gov

National Latina/o Psychological Association (NLPA) – www.nlpa.ws

National Society of Black Engineers (NSBE) - www.nsbe.org

National Society of Black Physicists - www.nsbp.org

National Society of Hispanic MBAs - www.nshmba.org

North Carolina Association of Women Attorneys (NCAWA) - www.ncawa.org

Society for Advancement of Chicanos & Native Americans in Science – www.sacnas.org


Society of Asian Scientists and Engineers (SASE) - www.saseconnect.org
Society of Hispanic Professional Engineers (SHPE) - www.shpe.org

Society of Indian Psychologists (American Indian and Alaska Native) – www.aiansip.org

Society of Women Engineers – www.swe.org

UNITY: Journalists of Color, Inc. – www.unityjournalists.org
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 and Compliance Office (919-966-3576) with any questions.

<table>
<thead>
<tr>
<th>SUBJECT</th>
<th>PERMISSIBLE INQUIRIES</th>
<th>INQUIRIES THAT MUST BE AVOIDED</th>
</tr>
</thead>
<tbody>
<tr>
<td>Age</td>
<td>Only inquiries related to minimum age requirements set by law; if required as a</td>
<td>(a) Requirement that applicant state age or date of birth.</td>
</tr>
<tr>
<td></td>
<td>Bona Fide Occupational Qualification (BFOQ).</td>
<td>(b) Request that the applicant produce proof of age (birth certificate, baptismal record).</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(c) &quot;How old are you?&quot;</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(d) &quot;We are looking for someone who can relate with younger students.&quot;</td>
</tr>
<tr>
<td>Criminal &amp; Background Checks</td>
<td>Permissible to ask about convictions for crimes that bear a direct relationship to</td>
<td>(a) Asking for disclosure of arrest, or any inquiry related to arrest.</td>
</tr>
<tr>
<td></td>
<td>the job. Consult with Equal Opportunity and Compliance Office if there are any concerns in this area.</td>
<td>(b) To look into criminal background without express written consent from candidate.</td>
</tr>
<tr>
<td>Citizenship, Birthplace</td>
<td>(a) “If hired, would you be able to show proof of authorization to work in the U.S.?”</td>
<td>(a) Asking if the person &quot;has a green card.&quot;</td>
</tr>
<tr>
<td></td>
<td>(b) For verifying authorization after being hired, applicants must be allowed to choose from any of the approved forms of proof available on the I-9 form (all new hires).</td>
<td>(b) Date of citizenship.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(c) Asking for proof of citizenship or work authorization before hiring (done after offer).</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(d) Whether spouse or parents are naturalized or native-born U.S citizens.</td>
</tr>
<tr>
<td><strong>Dependents</strong></td>
<td>None.</td>
<td>Inquiries regarding: the number and ages of children; what child care arrangements have been made; family planning.</td>
</tr>
<tr>
<td>----------------</td>
<td>-------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| **Disability** | (a) “Can you perform the essential functions of the job with or without an accommodation?”  
(b) Persons with disabilities can be tested in the pre-offer stage, but only if all applicants are tested. | (a) If the applicant has a disability, has ever been hospitalized, 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. |
| (has an impairment that substantially limits a major life activity; a record of such, or is regarded as having an impairment.) | | |
| **Marital and Family Status/Pregnancy** | (a) None at the pre-employment stage.  
(b) “Is there any reason you cannot work evenings or week-ends, if needed?” | (a) To ask if applicant is: single, married, divorced, widowed, etc.; Mr., Mrs., Miss, Ms. (ok after hire for tax purposes).  
(b) Inquiries regarding the names and ages of spouse or children.  
(c) Any inquiry concerning pregnancy. |
| | | |
| **Military Service** | (a) Any job related experience.  
(b) 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** | (a) For access purposes, whether applicant's work or research records are under another name.  
(b) "Is any additional information relative to change of name necessary to enable a check of your work and | (a) Inquiries about the name that would indicate applicant's lineage, ancestry, national origin, or descent.  
(b) Inquiry into previous name of applicant where it has been changed by court order or otherwise.  
(c) To ask if a woman is called |
<p>| | | |
| | | |</p>
<table>
<thead>
<tr>
<th>Category</th>
<th>Prohibited Questions</th>
<th>Permissible Questions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Educational Record</td>
<td>Should not ask for the applicant's birth certificate or educational record?</td>
<td>Should ask for her educational record? by Miss, Mrs., or Ms., or to ask for her maiden name.</td>
</tr>
<tr>
<td>National Origin</td>
<td>Languages, travel or cultural experiences as they relate to job requirements.</td>
<td>(a) Birthplace of the applicant, parents, grandparents, or spouse. (b) Any other inquiry into national origin or ancestry.</td>
</tr>
<tr>
<td>Professional Associations</td>
<td>Inquiries regarding memberships in <strong>job-related</strong> clubs and organizations. Applicants may omit those that reveal the race, religion, age, sex, disability, etc. of applicant.</td>
<td>(a) Requesting the names of all organizations, clubs, and associations to which the applicant belongs. (b) Inquiries regarding how the applicant spends his/her spare time.</td>
</tr>
<tr>
<td>Race, Color</td>
<td>None.</td>
<td>Any inquiry directly or indirectly that would indicate race or color, including color of eyes, hair, skin, or other feature.</td>
</tr>
</tbody>
</table>
| 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.                                                                                                                                                                                                                 | (a) Any inquiry that would indicate sex, unless a bona fide occupational qualification (BFOQ). \(b\) 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 and Compliance Office, University of North Carolina Chapel Hill. Originally created June 2009.
Appendix D: Sample Letters and Documents

SAMPLE: Letter to Equal Opportunity/ADA Office for Postdoctoral Fellow Appointments

*Submit Memorandum on Departmental Letterhead

MEMORANDUM

TO: Jayne M. Grandes  
    Interim 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
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 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]
SAMPLE: 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 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
SAMPLE: 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
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: ____________________
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:
___________________________________________________________________
___________________________________________________________________
___________________________________________________________________