UNIVERSITY OF CALIFORNIA
ACADEMIC PERSONNEL MANUAL

III. RECRUITMENT

Section Number	Section Title
APM 500	General
APM 501	From Other California Institutions
APM 510	Intercampus Transfers
APM 520	Employment of Near Relatives
APM 530	Noncitizens
APM 540	Travel Expenses
APM 550	Moving Expenses for Intercampus Transfers
APM 560	Removal Expenses/General
APM 561	Removal Expenses/Assistants
APM 570	Travel Expenses for Short-Term Appointees on Extramurally Financed Projects

500-0 **Policy**

The University recruiting program is directed toward obtaining the best qualified person for the position authorized.

Normally vacancies should be filled at the instructor or assistant professor level in the Professorial series and at the lowest rank in the other teaching series and in the Professional Research series.

500-6 **Responsibility**

Academic personnel for existing budgeted positions are normally recruited by the appropriate department chair, director, dean and Chancellor.

500-7 **Aids**

The following policies relating to travel and removal expenses are designed to facilitate the University's recruitment policies:

a. Travel Expenses for Recruitment (APM - 540).

b. Removal Expenses (APM - 560).

c. Removal Expenses — Assistants (APM - 561).

d. Moving Expenses for Intercampus Transfers (APM - 550).

e. Travel Expenses for Appointees to Visiting Titles (APM - 230-20-h).

f. Travel Expenses for Short-Term Appointees on Extramurally Financed Projects (APM - 570).

500-10 **Standards**

Necessary qualifications for new personnel and limitations on title and salary offers that may be made to prospective personnel are determined by the policies and procedures for appointment and promotion of academic personnel as set forth in the Academic Personnel Manual Part II, Appointment and Promotion.

500-16 **Restrictions**

a. All recruiting is subject to the limitation that appointments must conform to established University policies.

b. Special conditions must be observed before initiating negotiations with the prospective employee:

(1) Who is employed by another California institution (see APM - 501).

(2) Who is employed on another University of California campus (see APM - 510).

c. No administrative officer of the University shall offer appointment after April 30 for employment during the immediately ensuing academic year to a faculty member holding a tenure or tenure-track appointment at any institution which is a member of the Association of American Universities (see APM - 500, Appendix A, for listing of member institutions of the AAU, or online at http://www.tulane.edu/~aau).

(1) This restriction applies to offers for employment at the University of California in a visiting or acting capacity or as a Lecturer as well as to offers for appointments of indefinite duration.

(2) This restriction does not apply to offers for appointments which would not require any reduction in the individual's service at the home institution (e.g., an appointment during the summer quarter).

(3) This restriction does not apply to faculty members holding non-tenure track appointments at Association of American Universities member institutions even if they are being offered tenure appointments at the University of California.

d. Restrictions are placed upon the employment of near relatives of University employees (see APM - 520).

e. No commitment, formal or informal, may be made in negotiating for the recruitment of a faculty member to a budgeted position involving tenure or security of employment prior to the approval of the Chancellor.

f. Formal negotiations for recruitment of a faculty member may be initiated only with the prior approval of the Chancellor.

g. When an individual not in the employ of the University is to be offered a tenure appointment by two or more campuses of the University, the same level of salary shall be offered by each of those campuses. The following procedure is to be followed to make this procedure effective: when it becomes known to any campus administrative officer that another campus of the University is also recruiting an individual for a tenure appointment, that officer is obliged to inform the Chancellor. (Appointments subject to the foregoing procedures are also subject to provisions of the Academic Personnel Manual such as APM - 500 and 530 concerning recruitment of academic personnel and APM - 220-85 concerning appointment of academic personnel at the tenure rank.)

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Charlottesville, Virginia 22903

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Seattle, Washington 98105

University of Wisconsin
Madison, Wisconsin 53708

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Nashville, Tennessee 37203

Washington University
St. Louis, Missouri 63130

Yale University
New Haven, Connecticut 06520

501-0 **Policy**

a. It is the obligation of all department chairpersons and other administrative officers to recruit faculty on a national and international basis in order to assure a faculty of highest distinction.

b. The strength of the total scholarly community in the State is also a leading concern of the University, which must in its recruitment activities avoid depleting neighboring institutions of their faculty or causing undue inconvenience to the academic programs of such institutions at a given moment in time.

501-80 **Procedures**

a. No administrative officer of the University shall offer appointment to a Professor, Associate Professor, or Assistant Professor at another California institution after April 30 for employment during the immediately ensuing academic year. This restriction applies also to offers for Visiting, Acting, and Lecturer appointments. It does not apply to offers for part-time appointment that will not require any reduction in the individual's service at the home institution, nor does it apply to offers of summer employment outside the individual's regular terms of duty at the home institution.

b. In order to assure fulfillment of the policies set forth in Section 501-0, discussion with the Chancellor by the appropriate administrative officer must precede the initiation of formal negotiations for the recruitment of a Professor, Associate Professor, or Assistant Professor from other California institutions.

510-0 **Policy**

a. This policy applies to all permanent intercampus transfers of academic appointees other than those holding appointments for one year or less.

b. It is the obligation of those involved in the consideration of an intercampus transfer to pay due regard to the welfare of the University as a whole as well as to the wishes of the particular appointee and to the effect of the transfer on the two campuses directly concerned.

c. Compensation or reimbursement for expenses incident to the transfer may be allowable in accordance with the provisions of APM - 550.

510-16 **Restrictions**

If, in conjunction with an intercampus transfer covered by the policy in this section, an appointee who is a principal investigator or co-investigator under an extramurally funded contract or grant wishes to transfer the contract or grant or any part of the equipment funded thereby to the campus to which the appointee is transferring, the matter must be discussed at the earliest possible opportunity with the contract and grant administrator on the hiring campus.

Such transfer of contract or grant or equipment may be accomplished only after approval by both Chancellors concerned and in accordance with University rules for contract and grant administration and the rules of the granting agency.

510-24 **Authority**

Final approval of an intercampus transfer shall be made by the Chancellor of the campus to which the appointee is transferring.

510-80 **Procedures**

a. Prior to the initiation of negotiation for an intercampus transfer, the Chancellors of the two campuses involved shall be informed of the proposed transfer. In the case of a person holding a title under the jurisdiction of the Vice President—Agriculture and Natural Resources, the latter shall also be informed. See APM - 510, Appendix A, Guidelines on Intercampus Recruiting.

b. Ten working days before making the formal offer of appointment to the intended transferee, which offer shall be in writing, the Chancellor of the hiring campus shall indicate such intention to the Chancellor of the campus from which the appointee will be transferring. If the appointee holds a title under the jurisdiction of the Vice President—Agriculture and Natural Resources, the latter also be notified.

c. No offer of appointment which entails intercampus transfer of a continuing appointee shall be made after April 1 for service during the immediately following academic year, unless a later date is mutually agreed to by the Chancellors involved.

d. When an appointee on one campus is to be transferred to another campus, the appointee's rank and salary as recommended to be effective upon transfer shall be subject to academic and administrative review on the campus to which the transfer is to be made. The Chancellor of the latter campus shall make the final decision on the rank and salary of the appointee, subject to the following:

> Transfers made in accordance with the provisions of this section shall also comply with the provisions of Section 101.2(a) of the Standing Orders of The Regents (that is, that an advancement to an above-scale salary beyond the Regental compensation threshold shall be submitted to The Regents on recommendation by the President). For additional details on such procedures, see APM - 220-80 and 220-85.

e. An intercampus transfer may become effective immediately following a period of sabbatical leave of the person being transferred.

University of California
Office of the President
July 12, 1999

GUIDELINES ON INTERCAMPUS RECRUITING

The Guidelines on Intercampus Recruiting shall be distributed annually to deans, department chairs, directors, and other administrators who are involved in the intercampus recruitment of ladder rank faculty. These Guidelines concern faculty appointment only and do not address appointments to such administrative positions as Department Chair or Dean.

1. **Notification**

   a. A review for the recruitment of a faculty member from another UC campus cannot proceed at the campus level until the other Chancellor* of the campus from which the faculty member is being recruited has been officially informed.

   b. The Chancellor of the recruiting campus will notify the other Chancellor of the intention to make an offer at the earliest possible opportunity. The Chancellor of the recruiting campus will provide information about the details of the offer in writing as soon as such information is available.

   c. The information provided to the Chancellor must include any and all recruiting inducements, financial or otherwise and regardless of fund source, including the proposed salary, stipends or summer ninths, appointment to endowed chairs, teaching responsibilities and other recruitment incentives.

2. **Salary**

   a. The recruiting campus may offer a salary of no more than one step, or the equivalent of one step, above the faculty member's current salary. If the faculty member's current salary is an off-scale salary, the recruiting campus may offer the next higher step along with the same percentage increment.

   b. An offer which includes a promotion is permitted if the salary conforms with the requirements set forth in these guidelines.

* Chancellor or designee.

c. If a stipend is offered in addition to salary, it must be offered for bona fide administrative duties.

d. In response to the offer, the home campus may counter offer a salary equivalent to that of the recruiting campus.

e. If, at any time during recruitment, the home campus is reviewing the faculty member for a salary increase to become effective at a later date, the recruiting campus may not offer more than one step above the current salary until the review is complete.

f. If the home campus review results in a salary increase, the recruiting campus may offer a salary equivalent to the increased salary, even if the increase is more than one step above the salary at the time of the initial recruitment effort.

g. If the faculty member being recruited by another UC campus also is being recruited by an outside institution, then either the home and/or the recruiting UC campus may make a counter offer higher than that described above in order to compete with the outside offer.

3. **Start-Up Costs**

a. Presidential approval must be sought if the package of startup costs and other inducements (excluding housing assistance) exceeds $500,000 for faculty in the laboratory sciences, and $250,000 for other faculty.

b. The package shall include all expenditures such as laboratory renovations, research equipment, and summer salary for a faculty member.

4. **Office of the President**

a. At any point in a proposed intercampus recruitment, either Chancellor may request mediation or intervention by the Provost and Senior Vice President—Academic Affairs.

b. If there is a question regarding the application of these guidelines, the Provost and Senior Vice President—Academic Affairs will provide an interpretation of the guidelines.

520-0 Policy

The employment of near relatives, including domestic partners and those listed in APM - 520-4 (below), in the same department is permitted when such employment has been authorized in accordance with the following subsections. Such concurrent employment may arise under the following circumstances:

a. Two employees already holding positions in the same department subsequently become near relatives.

b. Simultaneous appointment of near relatives in the same department is recommended.

c. Appointment of one who is the near relative of an individual already employed in the same department is recommended.

520-4 Definition

A near relative is defined as an appointee's child, parent, spouse, domestic partner, or sibling. In-laws or step relatives in the relationships listed, including relatives of the domestic partner who would be covered if the domestic partner were the appointee's spouse, are also so defined. This provision also covers other persons residing in the appointee's household.

520-10 Standards

In searching for qualified candidates for a new or vacant position in a department, those persons responsible for recruitment shall not disqualify a candidate by reason of near relationship to an appointee already in the department or by reason of near relationship when simultaneous appointment of near relatives in the same department is recommended. When the recommended appointment involves such near relationship, this fact shall be noted in the recommendation, and an analysis of the possible conflict of interest or other disadvantage in the situation shall be forwarded through normal channels with the recommendation in sufficient time to permit complete review of the case before the proposed effective date.

520-16 **Restriction**

A member of the University staff shall not participate in the processes of review and decision-making on any matter concerning appointment, promotion, salary, retention, or termination of a near relative.

520-24 **Authority**

Each Chancellor or Vice President is authorized to approve an appointment in which a near-relative relationship in a department is involved or when simultaneous appointment of near relatives in the same department is recommended if, after review of the cases, the appointments are considered to be justified and in the best interest of the University. Such review and approval by the Chancellor or Vice President is also required to authorize the continuance of the appointments of two members in the same department when a near-relative relationship is established between them.

Office of the President: Vice President—Academic Affairs

January 24, 1972

Chancellors

Gentlemen:

Re: **Section 113 of Administrative Manual —**
Academic Policy on Employment of Near Relatives

Because the matter may be of interest to others, I am providing all of you with my answer to a question raised by one of the campuses as to use of the term "department" in Section 113 of the Manual concerning the academic policy on employment of near relatives.

The provisions of Section 113 may be considered to apply not only to departments of instruction and research but also to such other administrative units as organized activities and organized research units. There is no thought that a Chancellor should take special interest in the employment of near relatives within the same College, for example, if the relatives are not in the same department of instruction and research, or in the same organized activity, or in the same organized research unit.

Sincerely,

Angus E. Taylor

cc: Vice President McCorkle
Administrative Officers,
Office of the President
Principal Officers of The Regents

Note: Section 113 has changed number to Academic Personnel Manual Section 520.

530-0 **Policy**

The employment of noncitizens by the University is governed by certain acts of Congress and regulations of the U.S. Immigration and Naturalization Service regarding certain types of visas and work permits, and certain statutes of the State of California with which it has been the policy of The Regents to comply.

530-4 **Definition**

Noncitizen as used in this section refers to a person who is not a citizen of the United States.

530-12 **Exceptions**

Any alien who meets one or more of the following criteria is exempted from the prohibitions on employment of noncitizens:

a. A member of the faculty or teaching force of the University, interpreted to mean a person employed primarily as a teacher, researcher, translator or reader.

b. A specialist or expert temporarily employed to perform work on a special investigation requiring a high degree of technical skill. Temporary employment is interpreted as employment for any period of time on work performed in the execution of a contract to which The Regents is a party, the expiration of which contract will result in termination of the employee's service.

c. A professional person who has declared an intention to become a citizen of the United States.

d. A professional librarian.

e. A professional person duly licensed by the State and employed in a hospital or clinic operated by the University. (California Labor Code, Sec. 1940-44)

530-13 **Sponsorship of Immigration**

Under the Immigration and Nationality Act, 1953, the University may, in certain circumstances, sponsor immigration of noncitizens to the United States. In addition, there is provision for the transfer in status of noncitizens already within the United States from visitors to permanent immigrants. In undertaking such actions, the University assumes a responsibility of some magnitude.

It is University policy that no sponsorship shall be assumed except in behalf of individuals whose distinguished merit and superior ability can be adequately established. Further, that sponsorship will not normally be assumed except for individuals to whom the University has offered, or intends to offer, an appointment that carries the expectation of continued employment under conditions applying to regular faculty or other University appointees. Chancellors have authority to determine in individual cases whether or not University sponsorship will be assumed.

In accordance with this policy, no department, college, individual, or other unit of the University may initiate permanent immigration procedures, or correspond with any government agency in connection with any sponsorships or petitions to transfer status of visitors without the approval of the Chancellor.

The Chancellor will not authorize permanent immigration procedures in cases where, in the Chancellor's judgment, the purposes of the University may be served equally well by temporary visa procedures.

On a campus where there is a Foreign Student Advisor, the Foreign Student Advisor will assist in the preparation and filing of the necessary papers, following the authorization of any such actions by the Chancellor.

530-20 **Condition of Employment**

The acquisition of health insurance is a condition of employment for all alien employees except those persons in the United States on Permanent Immigrant Visas. For further information, see President's memoranda dated 2/27/63 and 8/15/63 on the subject.

540-0 **Policy**

It is desirable that recruitment be conducted in conjunction with travel grants authorized for other purposes; however, when deemed essential by the Chancellor, administrative travel grants for the recruitment of academic staff members may be available.

540-2 **Purpose**

To facilitate recruitment of the most highly qualified persons in the broadest geographical area, University travel funds are made available for recruiting purposes in accordance with the general policies and procedures on use of University travel funds.

540-16 **Restriction**

No commitments for administrative travel funds for prospective appointees shall be made without prior approval of the appropriate Vice President or Chancellor.

550-0 **Policy**

Whenever a member of the teaching faculty who holds a continuing appointment on one campus of the University transfers permanently to another campus or whenever another appointee is requested or ordered to move from one campus to another, the University will pay the moving expenses.

For possible eligibility for payment of removal expenses for those not eligible under this section, see APM - 560.

550-4 **Definition**

An eligible appointee may receive reimbursement for the following expenses:

a. Actual traveling expenses for the appointee and family in accordance with University travel regulations as announced by the Senior Vice President—Business and Finance.

b. Packing, insurance, and freight of the appointee's household goods when properly supported by invoices and receipts.

550-9 **Advance Payment**

In unusual circumstances advance payments for moving expenses may be made provided that the following conditions are met:

a. The requested advance is approved by the appropriate administrative officer of the receiving campus or location.

b. The proposed advance does not exceed 75 percent of the amount estimated to be paid by the University as computed by the Accounting Officer.

c. Procedures concerning advance payments are found in Business and Finance Bulletin G-28, Policy and Regulations Governing Travel.

550-22 **Source of Funds**

Moving expenses resulting from intercampus transfers are paid from the Supplies and Expense Budget of the receiving department. The departmental Supplies and

Expense Budget may be reimbursed from the provision for removal expenses upon certification of need.

550-24 **Authority**

a. The Chancellor of the receiving campus has the authority to approve moving expenses for intercampus transfer.

b. The Vice President— Agriculture and Natural Resources and the Provost and Senior Vice President—Academic Affairs have authority to approve moving expenses for intercampus transfers for appointees under their jurisdictions.

560-0 **Policy**

Removal expenses may be provided for certain new appointees (see APM - 560-14) to academic positions. Removal expenses are not provided automatically nor do they constitute a perquisite of University employment; they are paid in accordance with the purpose and procedure described below.

560-2 **Purpose**

Partial payment of removal expenses is a privilege which may be accorded to qualified persons in order to expand the geographical area for selection of permanent academic staff and thus enhance the effectiveness of University recruitment.

560-4 **Definition**

Removal expenses for which the University may reimburse eligible personnel are as follows:

a. **Reimbursement for the total cost**

Removal of a personal library belonging to a newly-hired faculty member, if such library is to be made generally available to students and faculty.

b. **Reimbursement for one-half the total cost**

(1) Packing, freight (but not storage) and insurance of household goods, when properly supported by invoices and receipts.

(2) Aircoach transportation for appointee and immediate family or an equivalent amount for other travel in accordance with standard airline fare policies and University travel regulations as announced by the Senior Vice President—Business and Finance.

(3) Meals en route for appointee and immediate family in accordance with University travel regulations as issued by the Senior Vice President—Business and Finance. If travel is by automobile, the cost of meals is an allowable expense only to the extent that might have been necessary if travel had been by air coach.

560-9 **Advance Payment**

In unusual circumstances, advance payments on removal expenses may be made provided that all the following conditions are met:

a. The prospective appointee has complied with all necessary requirements for the appointment.

b. The proposed advance does not exceed 75 percent of the amount estimated to be paid by the University as computed by the Accounting Officer.

560-14 **Eligibility**

Academic appointees who fulfill the following requirements are eligible for payment of removal expenses:

a. Academic appointees with any of the following title series and titles: Professor series, Astronomer series, Agronomist in the Agricultural Experiment Station series, Cooperative Extension Advisor series, Specialist in Cooperative Extension series, Professor in Residence series, Supervisor of Physical Education series, Continuing Education Specialist series, Field Work Supervisor, Supervisor of Teacher Education, Supervisor of Teaching, Assistant University Librarian, Associate University Librarian, and University Librarian.

b. If the nominating department provides reasonable assurance of its intention to recommend the Acting appointee for regular academic rank within one year following the initial acting appointment, the Acting appointee may be allowed removal expenses. In accordance with existing University policy on removal expenses, this allowance, which may be made without reference to any "emergency" aspects of the appointment, requires approval by the Chancellor.

c. Appointees to the Professional Research series (this excludes Research Assistants) and to the title Post-graduate Research (e.g., *Physicist*) may be reimbursed for removal expenses in those cases in which such payment is an allowable cost under the contract or grant. Those who have received travel expenses in accordance with APM - 570-0 and who later are continued beyond the original term of employment are eligible for reimbursement of removal expenses beyond the amount of travel expenses previously received; such reimbursement being subject to the policy then in effect governing such reimbursement for professional research personnel. It is not necessary that a specific provision for the purpose of making reimbursement for removal

expenses appear in the itemized budget if it can be established that it is allowable cost under the general terms of the contract or grant.

d. Visiting appointees who are subsequently appointed to the regular faculty ranks or to the regular Professional Research series are eligible for reimbursement of removal expenses beyond the amount of travel expenses previously reimbursed. Such reimbursement is subject to the policy then in effect governing such reimbursement for the regular faculty.

e. Teaching Fellows, Teaching Assistants, graduate students appointed as Associates or as Acting Instructors, and Research Assistants in agriculture are provided certain sums for removal expenses in accordance with the provisions set forth in APM - 561.

f. Lecturer and Senior Lecturer appointees are not eligible for removal expenses, but see APM - 283-20-e. for conditions under which some traveling expenses may be allowed.

560-16 **Limitations**

Since removal expenses are granted to the household and not to the individual members thereof, payment may not exceed more than one-half of the actual removal expenses for any one household even though more than one member of the same household may at the same time be appointed to the University staff.

560-22 **Source of Funds**

Removal expenses for persons whose appointment is funded entirely from extramural funds must be paid from non-State funds.

560-24 **Authority to Grant**

The Chancellor, the Provost and Senior Vice President—Academic Affairs, and the Vice President—Agriculture and Natural Resources are authorized to approve the payment of removal expenses and advances for removal expenses for those persons eligible as listed in APM - 560-14. They are further authorized to make exceptions in individual cases to APM 560-4 and 560-14.

560-94 **Application**

Application for reimbursement of removal expenses should follow the procedures of Business and Finance Bulletin G-13, Policy and Regulations Governing Moving and Relocation.

561-0 Policy

Removal expenses for Teaching Assistants, Teaching Fellows, graduate students appointed as Associates or as Acting Instructors, and Research Assistants in agriculture are authorized to be paid as flat rates depending upon the point of origin of the authorized travel and without regard to actual expenses, in accordance with the schedule described in APM - 561-18.

561-9 Advance Payment

In unusual circumstances, The Regents have authorized the Accounting Officer to make advance payments on removal expenses provided that all the following conditions are met:

a. The requested advance is approved by the Chancellor.

b. The prospective appointee has complied with all necessary requirements for appointment.

c. The proposed advance does not exceed 75 percent of the amount estimated to be paid by the University as computed by the Accounting Office.

561-14 Eligibility

The following titles are eligible for the partial payment of removal expenses under the provisions of APM - 561:

a. Teaching Assistants, Teaching Fellows, and graduate students appointed as Associates or as Acting Instructors, at the time of their initial appointment, recruited within the United States, who are appointed for a full academic year.

b. Teaching Assistants, Teaching Fellows, and graduate students appointed as Associates or as Acting Instructors, at the time of their initial appointment, recruited from outside the United States, who are appointed for a full academic year, but payment requires prior review and approval of the Chancellor. In no case may the maximum payment of $440 be exceeded.

c. Research Assistants in the field of agriculture at the time of their initial appointment, recruited within the United States, who are appointed for a full academic year.

561-16 **Restrictions**

Payment of removal expense allowances under APM - 561 for travel from points of origin within the State of California is not authorized.

561-18 **Rate**

Removal expense allowances are authorized to be paid as flat rates according to the following schedule, except that in no case may the maximum payment of $440 be exceeded:

Removal Expense Allowance	Approximate Air Miles from Point of Origin to UC Campus
$440	2,400 and over
355	1,800 to 2,399
280	1,300 to 1,799
225	900 to 1,299
160	under 900

561-22 **Source of Funds**

The local provision for removal expenses is used to reimburse the department Supplies and Expense budget for the payment of removal expenses for new academic appointees.

561-24 **Authority to Grant**

The Chancellor is authorized to approve the payment of removal expenses and advances for removal expenses for those persons eligible as listed in APM - 561-14.

561-94 **Application**

Application for reimbursement of removal expenses for those titles eligible under APM - 561-14 should follow the procedures of Business and Finance Bulletin G-13, Policy and Regulations Governing Moving and Relocation.

570-0 **Policy**

Instructional appointees, and appointees to the Professional Research titles (excluding research assistants) or to the Postgraduate Research *(e.g., Physicist)* title on extramurally financed projects (research or training) who are engaged for a specified term of not to exceed one year may receive payment for travel expenses within the term of the grant or contract. Limitations on travel expense payments and the procedures for payment of such expense shall be the same as those set forth in APM - 230-20(h). (See also APM - 560-14-d and -e.)