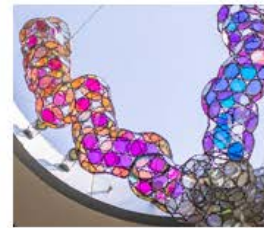




# Report of the Regents Working Group on Chancellor Search and Selection



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## **Acknowledgements**

The members of the Regents Working Group on Chancellor Search and Selection would like to thank Karen Zamarripa of Karen Zamarripa Consulting and Elaine Peters of Elaine Peters Executive Search for their primary role in researching and drafting this report. Additionally, the Working Group would like to thank and acknowledge Clare Sheridan in the Regents' Office and Yvette Gullatt and Abigail Bates in the Office of the President for their assistance and contributions in producing this report. Finally, the Working Group extends its appreciation to all of the current and former Regents, current and former campus leaders, former chancellor candidates, and alumni, students, and staff, who participated in the interview and survey process, as well as external leaders in higher education and search firm principals who shared their insights, policies, and procedures to inform the this report.

## **Members of the Regents Working Group on Chancellor Search and Selection**

Regent Lark Park, Chair

Regent Maria Anguiano

Regent Michael Cohen

Regent George Kieffer

Regent Rich Leib

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## I. OVERVIEW

The University of California (UC) is a 152-year-old public research and land-grant University. Comprised of almost 500,000 students, staff, and faculty, the UC is a \$38 billion enterprise that provides essential health care, education, research, and public service to the people of California and beyond. The University is universally regarded as the premier public University system in the world. Its institutional autonomy granted under the California Constitution makes the Board of Regents directly responsible to the people of California and mandates the highest degree of responsibility and accountability for carrying out the University's missions.

While the Board of Regents and the Office of the President have significant leadership responsibilities for the direction of UC, the vast majority of UC's work is carried out at and by its 10 campuses, led by the work of its chancellors and in the context of UC's shared governance.

The leadership of the ten chancellors is of paramount importance to UC: they direct billions of dollars in revenue, oversee the education of tens of thousands of undergraduate and graduate students, develop important industry and community partnerships, employ thousands of staff, maintain and improve the physical campuses, work to develop, attract, and retain world-class faculty, raise funds through philanthropy, serve the surrounding community, and embody the ideals of the University. Chancellors, who report directly to the President of the University, have a wide range of constituencies that they must be responsive to and work in partnership with, including local Academic Senates, the Office of the President, and the Board of Regents.

While over the years, the Regents have delegated authority for many of the operations of the University to the President, appointing chancellors remains one of the most important responsibilities, which the Board has reserved unto itself.<sup>1</sup> This reservation of authority requires particular attention and dedication by Regents with respect to the appointment of chancellors—the specific process which is set forth in Regents Policy 7102.

Given the paramount role chancellors play in the success of UC, and the authority for appointment specifically reserved to the Board, in November 2019 the Chair of the Board of Regents authorized a five-member Regents Working Group (“Working Group”) to examine current policies and practices regarding the search and selection process for chancellors. This working group set out to review UC's current policies and practices vis-a-vis comparator institutions, gather input from stakeholders about their impressions and/or experience with the current selection process, and make recommendations to improve how UC conducts chancellor search and selection.

Specifically, the working group highlighted the following goals:

The purpose and goals of the Regents Working Group on Chancellor Search and Selection are to investigate and fully understand the current chancellor search and selection process and to ensure that future searches utilize the best process by:

- *Reflecting, as appropriate, up-to-date, best practices of comparable institutions;*

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<sup>1</sup> [Bylaws 22.2](#) and [31](#) both speak to the Board's reservation of these duties upon recommendation of, and in consultation with, the President.

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- *Developing and reaching candidate pools that include individuals with a history of success in a broad range of relevant positions and the leadership capacity to meet the challenges and opportunities related to the particular campus;*
  - *Developing and reaching candidate pools that reflect a high degree of gender, ethnic and experiential diversity;*
  - *Deriving the most value from the search firms that are selected, and, if applicable, selecting search consultants or firms that have demonstrated capabilities in helping institutions realize their goals and values in executive searches;*
  - *Employing an unbiased process, including a process that is as free from implicit bias as possible;*
  - *Making the best use of the talent and time of those involved in the selection process; and*
  - *Reflecting robust and diverse stakeholder input and thinking relative to a campus' future direction and needs.*

## **A. Methodology**

As part of this effort, two external consultants<sup>2</sup> working with staff from the UC Office of the President (comprising the “Consultants”) were retained to gather information, including a survey of previous search committee<sup>3</sup> members who participated in the last five chancellor searches. The Consultants also conducted interviews with University stakeholders, including current and former Regents, alumni, and students, as well as external leaders engaged in higher education and diversity efforts. Several leaders at comparable universities also shared their insights, policies, and procedures to inform the Consultants. Finally, principals in five nationally recognized search firms, many of whom have done work with UC, were also interviewed by the Consultants.

Because of the opportunity provided to examine how all aspects of the search and selection process can be improved, the Consultants also reviewed and used as a reference tool the report of the 2018 UC-CORO Leadership Collaborative, “Leading with Diversity: UC as a National Model for Cultivating Diverse Leaders,” in order to underscore how UC can better integrate diversity, equity, and inclusion practices into its chancellor search and selection process. The Consultants also reviewed the policies and procedures of UC as well as over ten systems, public documents regarding President/chancellor searches, and search firm materials provided by interviewees and available to the public via websites.

### Survey

Members of the past five UC chancellor search committees, including Regents, faculty, students, and alumni, were invited to share their perspectives on the process via a 20-minute survey administered online between November 2019 and February 2020.<sup>4</sup>

Of the 74 members who have served on these past searches, 36 individuals—or 49 percent—responded to the survey. Response rates were at significant levels for all stakeholder categories.

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<sup>2</sup> Karen Zamarripa, Karen Zamarripa Consulting; Elaine Peters, Elaine Peters Executive Search

<sup>3</sup> The search committee is prescribed in Regents Policy 7102.

<sup>4</sup> Only one member of this Working Group participated in this survey.

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Those who completed the survey are referenced in this report as “respondents.” Survey questions queried respondents on use of time and expertise, input from stakeholders, the role of various stakeholders in the process, the deliberative process of the search committee, the transparency of the process, the role of and satisfaction with the search firm, and, finally, the diversity of candidate pools.<sup>5</sup>

### Interviews

Individuals who were interviewed are referenced in this report as “interviewees.” Over 20 internal stakeholders were selected for more in-depth interviews, where they discussed their experiences and perceptions of the current search process. Stakeholders included current and former Regents, current and former campus leaders, former chancellor candidates, and alumni, students, and staff. Individuals were queried on their thoughts about the selection of search committee membership, the orientation and training for the search committee, the time commitment for each search process, the transparency of decision-making, the engagement of both internal and external stakeholders, the role and value of search firms, and the importance of diversity in the search process, as well as overall observations regarding possible improvements. Interviews were also conducted with over 20 external groups including comparator institutions, search firms, and external organizations involved in higher education, equity and policy development.

The report presents findings from these information-gathering efforts and includes recommendations. While the focus of the report is to provide a comprehensive set of recommendations related to chancellor searches, opportunities to improve diversity, equity, and inclusion in this process are highlighted in order to reflect UC’s commitment as outlined in Regents Policy 4400: Policy on University of California Diversity Statement.

## **B. Key Themes**

The survey and interviews with stakeholders, comparator institutions, and search firms revealed opportunities to improve the chancellor search and selection process and establish procedures that better reflect the values of the University. Two key themes emerged:

### ***1. Regents should play a stronger and more clearly defined role in the chancellor search and selection process, consistent with its reservation of authority pursuant to its Bylaws.***

Current policy articulates that five Regents, plus the President of the University and Chair of the Board, shall participate on a chancellor search committee, but current policy does not articulate any further responsibilities of these Regents in selecting campus chancellors. Hence, neither the President nor the five appointed Regents who serve on a search committee may be fully oriented to the need for Regents’ full engagement and involvement throughout the process; specifically, that as members of the search committee they are also obligated to uphold Regents’ Policies, to prepare for committee meetings, and to participate fully in meetings and candidate interviews. In order to ensure that each search reflects a clear and joint commitment to recruiting and retaining new leaders that can secure the confidence of the full Board of Regents, the Regents on the

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<sup>5</sup> See Appendix C for survey instrument.

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search committee and the President should more fully engage in the search as true partners in the search process.

***2. The chancellor search process can better reflect UC's commitment to equity, inclusion and diversity, including experiential diversity.***

While UC has employed long-standing practices that have led to the hiring of successful, and particularly of late, more diverse chancellors, stakeholders highlighted impediments to getting a diverse pool of high-quality candidates who best meet the needs of the campus, its students, and community opportunities. Many of those who participated in this inquiry questioned whether UC is fully committed to diversity, broadly defined as not only gender and ethnicity, but experience and expertise as well. The composition of the search committee, the strong reliance on or deference to faculty participants, and the criteria used to select candidates were seen by many as limiting UC's ability to strengthen its commitment to diversity. Some stakeholders expressed that a more inclusive, broader view of the role of campus chancellors would be necessary to recruit high-quality, diverse leaders in the future.

Additionally, the experiences of several candidates from diverse backgrounds within the search process itself revealed that attitudes and behaviors by UC leaders, the Regents, and others in the process caused them to voluntarily withdraw their candidacy. Understanding better the reasons behind these withdrawals will help future search committees improve communications with all candidates.

**C. Summary of recommendations**

This report identifies 17 recommendations for changes to University policy, administrative practice, and governance roles and responsibilities that can improve the chancellor search process and foster greater diversity and inclusion in the candidate pool and in the search itself. These recommendations are discussed in more detail in Part III of this report.

To improve *policies* governing the search process, the working group makes the following recommendations:

1. Revise Regents Policy 7102 to articulate the roles and responsibilities of the Regents as they pertain to working in partnership with the President to recruit and select campus chancellors.<sup>6</sup>
  - Specify that the President will meet with the Regent members of the search committee prior to retention of the search firm and appointment of other members of the search committee to discuss the search process.
  - Specify that following the process of the full search committee, the President shall meet and discuss candidates with the Regent members and then propose a candidate for approval by Regent members of the search committee prior to recommendation to the full Board. The President shall notify all non-Regent members of the search committee of the recommendation at an appropriate time.

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<sup>6</sup> See Appendix B for proposed changes.



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2. Revise Regents Policy 7102 to invite faculty and other stakeholders to submit any number of promising candidates to the search committee for consideration.
  3. Revise Regents Policy 7102 to specify a minimum number of nominees from identified stakeholder groups from which the President may appoint to the search committee to ensure that the search committee has the best balance in the skills, background, and experiences of committee members and to ensure that the search committee represents the diversity of the UC community.
  4. Revise Regents Policy 7102 to specify that the President will ensure that the University has a continuous, robust process for identifying promising candidates.

To improve the *process*, the working group makes the following pre-search, search, and post-search recommendations:

*Pre-search, or search preparation:*

5. Request that the Governance Committee periodically approve the Request for Proposals (RFP) used to qualify search firms which demonstrate a high level of commitment to diversity.
6. Periodically rotate among approved search firms for active searches in order to take full advantage of search firms' networks and practices.
7. Request that the Governance Committee develop and periodically review job expectations for all chancellors, and request that the full Board approve these and any changes proposed.
8. Provide orientation and training for the search committee before they begin their work, including, but not limited to, stakeholder engagement, implicit bias, job description and qualities required of a chancellor, candidate criteria development and use, schedule and timeline (including campus visits), and interview protocols and confidentiality. Provide clarity on the roles and responsibilities of all search committee members, including their contribution to the search process. Provide training on how to evaluate candidates according to job criteria.

*During search:*

9. The President should consult with the full search committee on the management of meetings, including but not limited to the process the President will use to ensure that all search committee members' perspectives are considered.
10. Launch the search process with a joint visit of the University President and the Chair of the Board of Regents to the campus to set the tone for the search and affirm commitment to a shared vision for the future of the campus and expectations of campus chancellors. These visits will also outline the search process, seek support from stakeholders to find the best candidates, and establish priorities of the search, which include the importance of inclusivity, transparency, and commitment to diversity.
11. Engage in broad outreach to community and affinity groups, local government and business leaders, and educational partners to identify a candidate pool that reflects the needs, goals, opportunities, and demographics of the campus.

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12. Engage the full search committee to establish campus-specific job criteria that may augment the job expectations approved by the Governance Committee and full Board to develop the job description, and create a campus profile or Challenges and Opportunities paper based on input from other stakeholder groups. Include abilities, experiences, and skills that the chancellor needs to lead the campus in the criteria for consideration, which will then be used by the search firm to screen candidates for possible interview by the search committee. These criteria will also be utilized by the search committee during the candidate assessment process.
  13. Utilize the selected search firm to conduct the initial screening of applicants.
  14. Provide regular updates to the full Board in closed session regarding active searches—from initial application through the interview phase.

*Post-search:*

15. Provide an annual report to the Board of Regents on the diversity of campus and systemwide executive leadership positions from initial applications through the interview phase and include candidate feedback on an anonymous basis from those who did not accept offers or who withdrew their candidacy prior to the closure of the search.
16. Expand existing, or establish new, formal executive leadership development programs to encourage and help prepare current UC administrators and faculty to compete and succeed in leadership roles.
17. Develop an on-boarding process to ensure that all newly appointed chancellors and other leaders at UC feel supported, welcomed, and valued as new members of the University.

## **D. Organization of the report**

The following pages describe the working group's findings and recommendations.

Part II, **Findings**, provides relevant context and summarizes the findings of the surveys and interviews into three sections:

*Background and General Findings* discusses current University policies related to the chancellor search process and viewpoints expressed by internal stakeholders.

*Roles and Responsibilities* describes the different ways stakeholders currently participate in the chancellor search process. It discusses findings about the roles and responsibilities of the University President, Board of Regents, faculty, search firms, and other stakeholders in contributing to the search process.

*Process* includes findings from surveys and interviews related to the ways in which the search process is carried out. This section includes findings on the process of the search committee, including the training for engaging in the search process from the perspectives of those who have participated in previous searches. This section also discusses findings on the development of the job description, screening of potential candidates, and outcomes of the search.

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Part III, **Recommendations**, provides greater elaboration on the recommendations that address the report's findings.

Part IV, **Conclusion**, provides concluding comments to this report.

Part V, **Appendices**, provides relevant Regents Policies, proposed amendments to Regents Policy 7102, the survey instrument, and interview protocols.

## **II. FINDINGS**

### **A. Background and General Findings**

Policy guides the process by which campus chancellor searches are undertaken and includes rules to govern aspects of the search. Regents Policy 7102: Policy on Appointment of Chancellors most directly guides this process. Regents Policy 4400: Policy on University of California Diversity Statement may also be seen as relevant to the way the University engages in the search process.

#### Regents Policy 7102: Policy on Appointment of Chancellors

In accordance with Regents Policy 7102, the search committee, currently chaired by the University President, is the backbone of the chancellor search; screening, advancement of candidates, and deliberation are carried out within this group of individuals.

Regents Policy prescribes the 17-member search committee's composition: in addition to five Regents who are appointed to the search committee by the Chair of the Board of Regents, the search committee consists of the Chair of the Board and the President in *ex-officio* roles; five faculty members appointed by the President, one of whom is the chair or vice chair of the Academic Senate and another of whom is a faculty member on a campus different from the one for which a chancellor is being selected, and three of whom are faculty members from the campus that is the subject of the search; an undergraduate and a graduate student appointed by the respective graduate and undergraduate student associations of the campus; and one member who serves as a representative of each of the following: alumni (appointed by the alumni association of the campus), a foundation representative (chosen by the President from nominations made by campus foundations), and staff (selected by the campus Staff Assembly). In each case, the respective organization for each stakeholder group selects their nominees using their respective policies and procedures.

The composition of the search committee is an important consideration, as the members advise the President on the selection of campus chancellors. Since chancellors respond to multiple constituents and represent diverse campus interests, it is vital to ensure that, within the parameters enshrined in policy, the search committee composition intentionally and purposefully reflects the needs of the campus community as a whole. For instance, the chancellor has been described as the "mayor" of the campus.

Per current policy, the University President convenes the search committee and makes the final recommendation to the Board of Regents for its approval. This is unlike most other systems, which fully engage the entire governing board in the process, including the interviewing of final

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candidates to assist in the selection of the finalist. Many other comparator institutions include their governing boards in candidate interviews, and in some cases, the full board manages the search from start to finish.<sup>7</sup>

In addition to prescribing the composition of the search committee, Regents Policy 7102 also requires the University to undertake a systematic nationwide search each time a chancellor vacancy occurs. To conduct such a search, UC engages the services of executive search firms to support the search committee and process. Currently, the University has a master agreement for selecting qualified firms to support system and campus level searches.<sup>8</sup>

Finally, Regents Policy 7102 also requires the President to perennially search for promising candidates, requires the five faculty members on the search committee to submit not fewer than five promising candidates, and requires that “Both the committee and the President shall be mindful of the University’s firm commitment to diversity in the employment of women and minorities in seeking out the most qualified candidates.”

#### Regents Policy 4400: Policy on University of California Diversity Statement

Complementing this commitment to diversity expressed in Regents Policy 7102, Regents Policy 4400 may also be seen as a guiding policy for the search process. The policy states in part:

“...Because the core mission of the University of California is to serve the interests of the State of California, it must seek to achieve diversity among its student bodies and among its employees...Diversity should also be integral to the University’s achievement of excellence...

...Therefore, the University of California renews its commitment to the full realization of its historic promise to recognize and nurture merit, talent, and achievement by supporting diversity and equal opportunity in its education, services, and administration, as well as research and creative activity. The University particularly acknowledges the acute need to remove barriers to the recruitment, retention, and advancement of talented students, faculty, and staff from historically excluded populations who are currently underrepresented.”

Within the context of these two policies, concerns were expressed by internal stakeholders that UC is not as committed to diversity, as expressed in these policies, and that UC needs to be more open to change in its long-standing processes.

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<sup>7</sup> The closest example is from the California State University, where finalists are presented to the full board for interview in closed session, and the board confirms which candidate to offer the position, in consultation with the chancellor (who heads the CSU system). However, University boards may vary considerably in size, potentially impacting the ability for a full board to interview all candidates.

<sup>8</sup> Master agreements are common practice for large public organizations such as UC, giving campuses and system offices the ability to use vendors that have been pre-qualified through a procurement process that meets the requirements of the law. By creating such master agreements, pre-approved search firms can be tapped in a more timely and often cost-effective manner. Despite several firms that have been qualified, the last six searches were managed by the same firm.

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For example, internal stakeholders observed that UC tends to hire outside its own system and state, and faculty and others believe that the best candidates are outside of UC and outside California, often dismissing, if not discouraging, internal leaders interested in new opportunities. Several interviewees raised the issue of lack of internal hires multiple times. One respondent noted, “We ought to respect people who have navigated the system well. We should look at what they have done.” Despite the quality education provided by UC, searches continue to associate outside candidates with better quality and more desirable credentials. (It is worth noting, however, that three out of the last five chancellors hired came from a UC campus.)

Internal stakeholders also expressed concerns that the composition of search committees, the strong reliance on or deference to faculty participants,<sup>9</sup> and the criteria used to select candidates limited UC’s ability to strengthen its commitment to diversity, broadly speaking. Stakeholders suggested that a more inclusive, creative view of the role of campus chancellors would be necessary to recruit future leaders, given the complexity of the chancellor’s role.

Finally, the experiences reported by candidates from diverse backgrounds within the search process itself revealed a disconnect between UC’s commitment to diversity and practice. Several candidates cited attitudes and behaviors by UC leaders, the Regents, and others in the process that resulted in their voluntary withdrawal from candidacy.

For UC to sustain and build on its values of equity, inclusion, and excellence, stakeholders emphasized that there needs to be an intentional commitment from the Board of Regents and University President throughout the entire search process: forming the committee; writing the position description, candidate attributes and selection criteria; selecting an executive search firm; conducting the search process itself; and appointing and supporting new chancellors. Given the depth of talent across the enterprise, it was also noted that leadership development for future chancellors from within the UC system can and should play a much larger role as well.

## **B. Roles and Responsibilities**

The process of hiring a chancellor is a complex one. Many stakeholders are involved, both formally and informally. The President and Regents must ensure transparency and visibility into the process and engage a diverse array of stakeholders, all the while upholding strict confidentiality protections for candidates. Managing these multiple interests and objectives requires a thoughtful execution of roles and responsibilities that can harmonize competing priorities in the search process. The following findings represent opportunities for improvement related to how the different responsible parties can engage in the search process.

### ***1. The role of the President and Board of Regents***

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<sup>9</sup> Item 3 of Regents Policy 7102 codifies the faculty role in the search process: “The five faculty members on the Committee, working with the President of the University or the President’s designee will submit to the Committee for evaluation not fewer than five promising candidates. The Committee will evaluate these nominations and may consider or suggest other names...” However, this part of the policy does not prescribe or reflect the practice of utilizing the faculty members as a subcommittee to provide a substantial initial screening of all applicants.

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Per policy and practice, the President assumes the largest share of duties in the chancellor search process. The President chairs the search committee, selects the search firm, selects the final candidate for recommendation to the Board, negotiates an agreement with the candidate, and brings the candidate to the full Board for approval.

Unlike most systems across the country, including the University of Michigan, University of North Carolina, Texas A&M, and the California State University, the full Board of Regents does not interview candidates, but approves the candidate recommended by the President generally after negotiation with the candidate has taken place. Prior to the President's selection, the five Regents appointed by the Chair of the Board, along with the Chair, participate on the search committee, represent the full Board's interests, and help instill confidence in the President's recommendation of a candidate for hire.

Several interviewees, however, noted that Regent members do not always have the full information necessary to fulfill their roles. At times, Regent members were not apprised of final candidate developments, such as which candidates became top choices of the President, or which candidates dropped out and why. Some interviewees (both former Regent and general search committee members) noted that they did not know who the final candidate(s) were after having spent a great deal of time and effort on the search as search committee members. This led many to comment that the process is not transparent and is really more a process of "insider baseball," meaning that there are separate rules and structures to which only a select few are privy. There was also one case noted where the final candidate was someone not reviewed or discussed by the search committee during the process.

Interviewees noted that this lack of transparency and confusion in the process was the result of limited consultation with and involvement of the Regents on the search committee, the search committee as a whole, and the full Board of Regents.

Interviewees offered suggestions to improve the transparency of the process with the Board members, including holding closed sessions with the President to provide updates on the diversity of the applicant pools, candidate lists, and finalists. Others also suggested that the President meet and confer with the full Board in closed session to brief them on the finalists and to share recommendations. Regardless, given their role and responsibility for the oversight and governance of UC, interviewees noted that Regents need to be more engaged and involved in the process, whether it's through deeper engagement during the entire search process or greater shared responsibility between the President and the Regent members of the search committee.

## ***2. The role of the faculty***

UC's model of shared governance with faculty, primarily exercised through systemwide and local Academic Senates, has been credited by many as a key driver to UC's success in academic and research excellence. Without a doubt, faculty are a critical part of the University and as such, should continue to play an active role in campus chancellor searches. Both systemwide and campus Academic Senates have a role in the search process. Additionally, the campus Academic Senate is responsible for choosing other faculty nominees for the search committee. With that in mind, survey respondents were asked to share their perspectives on the role and contributions of faculty in the process.

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Survey respondents and interviewees consistently agreed that faculty must be involved in the process, but both groups also raised concerns that faculty chosen by the campus Academic Senate often do not represent the diversity of the campus and the broader UC system.<sup>10</sup> Historically, faculty members on chancellor search committees are more homogenous in terms of age, race/ethnicity, gender, and academic discipline than are UC's campuses and the UC system overall.

As one respondent noted: "Faculty are indispensable in the search process, but they can be a barrier to a successful, diverse search." Other respondents suggested that endorsing the "privilege of the faculty view" over and above other perspectives is not productive for UC and will not result in selection of campus leaders with the full range of knowledge, abilities, and necessary skills to lead a complex University. Respondents and interviewees observed that faculty search committee members are primarily focused on the academic qualifications of prospective candidates, which leaves less opportunity to explore other experience and expertise necessary to be a successful chancellor. The faculty tend to define quality and excellence in terms of academic achievement and prefer candidates from Research I institutions and those who are outside of UC and California. Narrowly focusing on this particular set of qualifications may exclude many high-quality candidates and reduces the diversity of the candidate pool before the process really begins. In other words, this almost exclusive focus on academics by faculty may prevent the University from identifying and attracting diverse leaders whose backgrounds may include other qualifications necessary for successfully leading highly complex organizations. At the same time, some interviewees noted that the early and continued support of faculty is a critical requirement of a successful chancellor.

Similar to the observations on the homogeneity of the faculty search committee members, respondents and interviewees both noted that since the search committees have been demographically similar, the subsequent lack of diversity among candidates should not be surprising. (One way to interpret this similarity is that the conditions that prevent greater diversity in faculty extend to executive-level administrators as well.)

Finally, interviewees also expressed concerns regarding the time faculty members spent on initial screening activities in relation to the overall value produced by these screenings.

### ***3. The role of the search firm***

Executive search firms give potential recruits and candidates a confidential place to discuss the opportunity and engage with the search committee. Search firms also manage the recruitment and outreach necessary to develop a candidate pool.

The 2018 UC-CORO report notes the importance of the search firm in a successful search; it also notes that:

The recruiters' role (search firms) is, first and foremost, to work on behalf of their clients; in this case, the UC. Thus, their client's priorities become the priorities of the recruitment firms. 'Our work reflects their priorities'. (p.23)

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<sup>10</sup> Sixty-four percent of the system faculty are currently White and 58 percent are male, UCOP Infocenter, Workforce Diversity, April 2019.

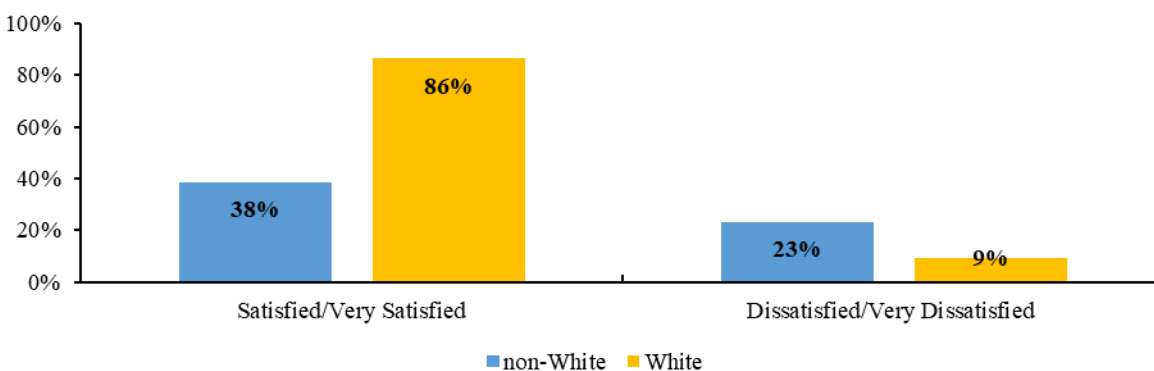
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The report also goes on to note that there is a need to hold search firms accountable if UC is going to change the results.

For the most part, survey respondents were satisfied with the search firms they worked with in the past. Overall, respondents were satisfied with the ways the search firm assisted in the development of the job description, prepared the search committee for the campus visit, and managed the general recruitment and outreach.

One area where there was disagreement was in the screening, management, and recruitment of diverse candidates (experiential, gender, ethnicity). In the screening of applicants, non-White respondents indicated low levels of satisfaction compared to their White colleagues (see Figure 1).<sup>11</sup>

Figure 1. Degree of satisfaction in the search firm’s ability to screen applicants, by race (Question 21)



Search firms are critical in recruiting the right candidates, and for UC that includes candidates who reflect the diversity of the system. However, unless challenged, search firms will tend to keep presenting the same pools over and over again. In most cases, firms provide at least 80 percent of the candidates and yet, historically, the pools of competitive candidates have not been very diverse. There are multiple reasons for this outcome, including the expectations of the search committee. Too often, however, when candidates who represent diverse options are presented by the firm, they are not necessarily considered serious contenders when compared to other candidates, given the traditional qualifications defined by the faculty subcommittee. Many interviewees believe that the firms often nominate “token” diversity candidates to demonstrate that they put forth a diverse pool of applicants. In the end, however, the firms take their lead from their employers, in this case the President and Board of Regents.

This “tokenization” of applicant pools may have an impact on the degree to which search committee members are satisfied with the firm’s ability to recruit candidates who represent both demographic and experiential diversity (see Figure 2, Figure 3).

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<sup>11</sup> Respondents are those who responded to the survey. 43 percent of the total responses were submitted by faculty, 63 percent of respondents were White, and 57 percent were male. Where disaggregation by race (white/nonwhite), role (faculty/regent/other), or gender (male/female) revealed notable differences in response, accompanying charts have been provided.



For instance, among different racial categories, White participants were overwhelmingly satisfied with the efforts to recruit a diverse pool of candidates, with eight in 10 expressing satisfaction. However, among their non-White colleagues, only three in 10 expressed that same satisfaction. Similarly, Regents were less satisfied in the diversity recruitment efforts than their faculty colleagues. Interestingly, female respondents were more satisfied than their male counterparts in diversity recruitment efforts, both for demographics and experience.

Figure 2. Degree of satisfaction in the search firm’s ability to recruit candidates who represent demographic diversity, by race (Question 21)

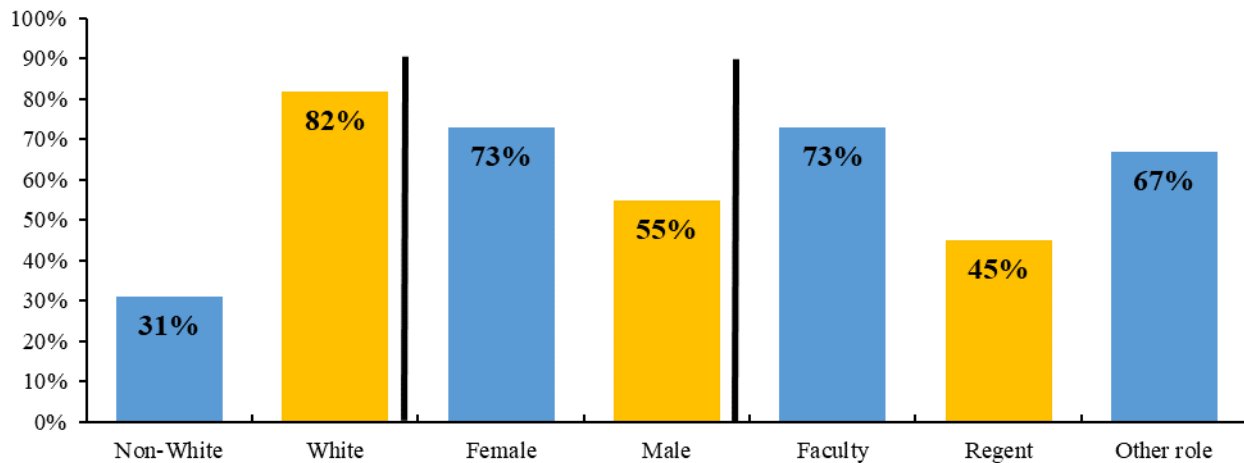
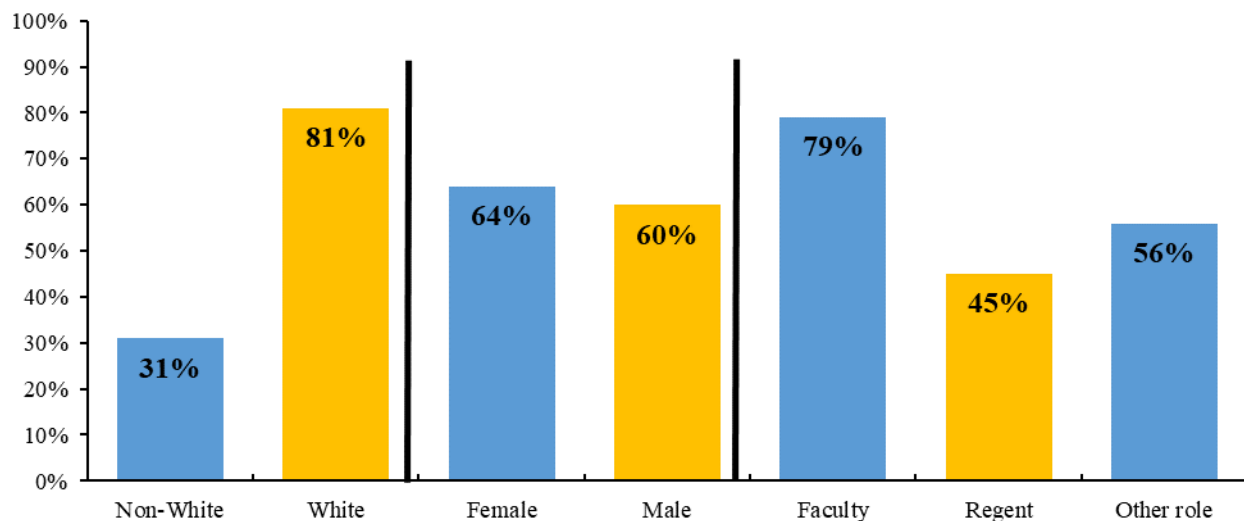


Figure 3. Degree of satisfaction in the search firm’s ability to recruit candidates who represent experiential diversity, by race (Question 21)



#### 4. The role of other stakeholders

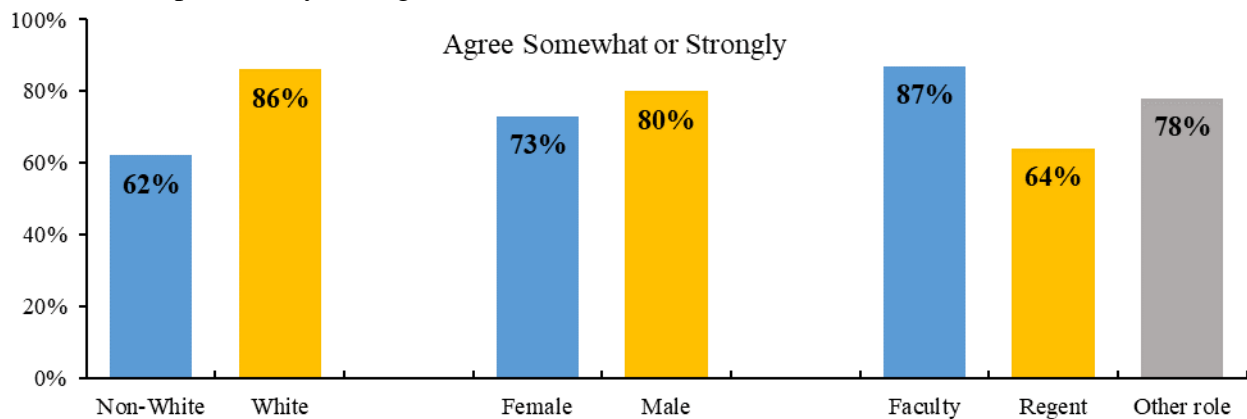
In addition to committee composition, it is also important to consider who is invited to provide input into the search. Although they are not formal members of the search committee, many

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individuals and groups from the campuses and broader community should have the opportunity to share insight and advice on their future chancellor.

While various stakeholders were asked to participate, share ideas, or engage with the process itself, there were sharp differences in responses on the survey. Although over three-quarters of all respondents agreed that the broader community was directly involved in the search process, this masks some differences across groups. For instance, only 62 percent of non-White participants felt that the community was directly involved, compared to 86 percent of White participants (see Figure 4).

Figure 4. Those who agree somewhat or strongly about the inclusion of the broader community in the search process, by race, gender, and search committee role (Question 14)



Nearly one-third of all survey respondents felt that more campus and community stakeholders should be involved in the search process, including staff and others working on the campus. (Questions 16 and 17). Respondents also suggested that members of the broader community, such as city council members, business leaders, state legislators, and representatives from other educational sectors (e.g., high schools, community colleges), be given an opportunity to share their views.

### C. Process

Although Regents Policy 7102 codifies at a high level the process for the hiring of chancellors, most practices are neither codified nor memorialized and exist more by informal convention or past practice. Findings from both the survey and interviews revealed different ways search committees have engaged in the search process. Respondents and interviewees shared their experiences as members of search committees and their reactions to the informal practices of hiring a chancellor.

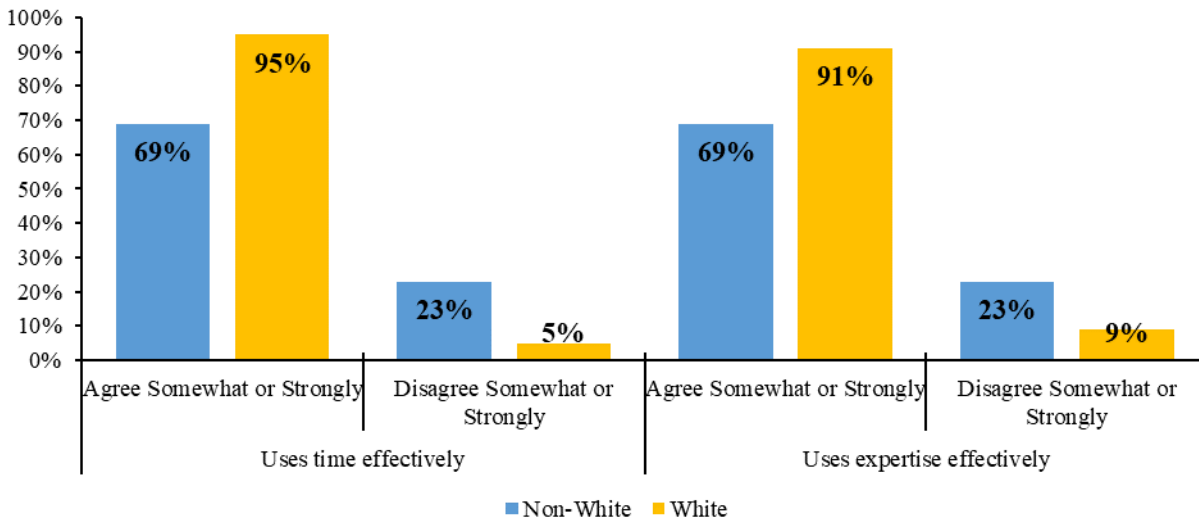
#### 1. Search committee process

In general, findings show that most former committee members acknowledged the length of time required to hire a campus chancellor. There was a belief that it was better to engage in the process fully and deliberately, and if that requires more time, then that is what must happen. Specifically, one interviewee stated that we “just need to muddle through it” to get a candidate with the support and buy-in of all involved in the process.

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Respondents indicated they thought the search process used search committee members' time and expertise effectively. However, there were differences by race. Nine of ten White respondents approved of the committee's use of time and expertise, while only seven of ten non-White respondents felt this way (see Figure 5).

Figure 5. Agreement on the use of time and expertise, by race (Question 14)

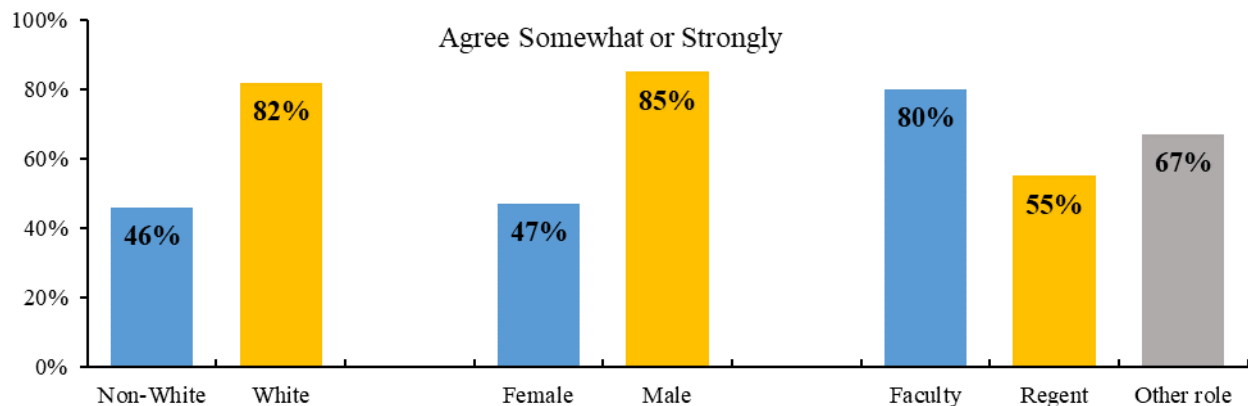


There is a consistent concern about lack of transparency of the search process. Search committee members did not understand how candidates were screened and initially selected by the faculty subcommittee, nor what criteria were used for the screening and selection of the chancellor. This led to the assumption that the initial “cut” was more about exclusion than inclusion, and more about academics than about the comprehensive job of a chancellor.

Furthermore, across all groups, the majority of those who identify as White, male, or faculty members agreed somewhat or strongly that the search process was transparent, yet their counterparts (non-White, female, Regents, or other roles) overwhelmingly disagreed (see Figure 6).

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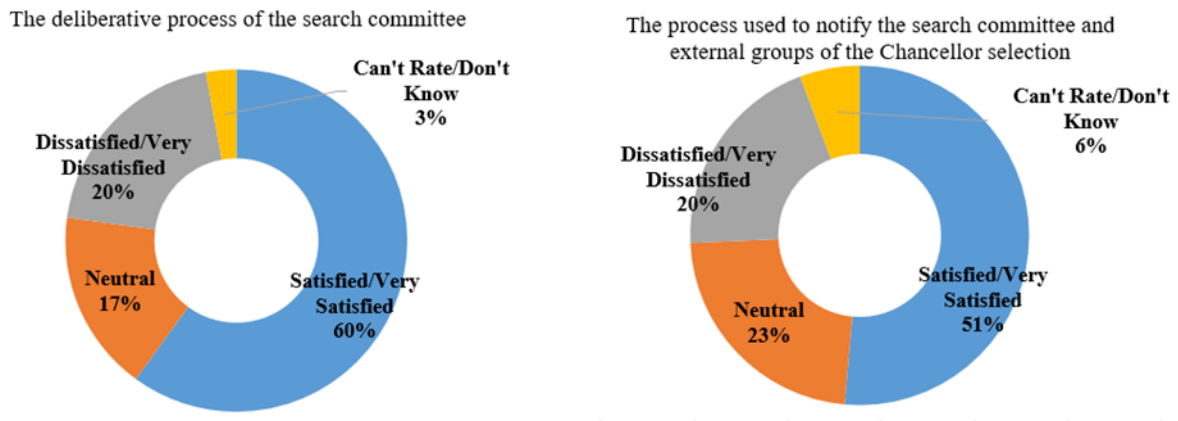
Figure 6. Those who agree somewhat or strongly about the transparency of the search process, by race, gender, and search committee role (Question 14)



There were varying levels of satisfaction with the deliberative process and notification method to the search committee of the final candidate. Overall, one in five respondents was dissatisfied or very dissatisfied with the deliberative process of the search committee, as well as the process used to notify them of the final selection (see Figure 7a). Specifically, some former members stated that they were unclear how the final candidate was chosen and what criteria were used to make the decision.

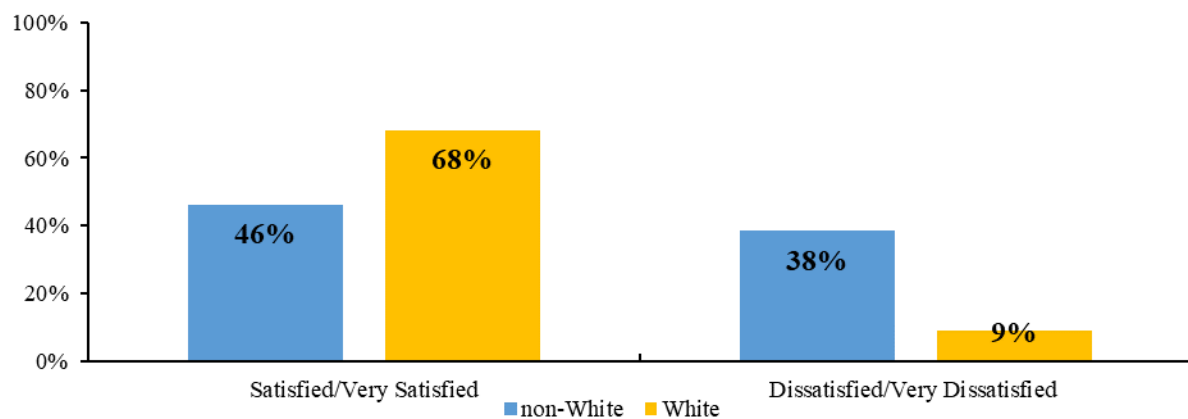
In considering these, it is necessary to underscore that there is a fine line between transparency and the confidentiality necessary to get the best candidate for the job. It is common practice in such high-level searches to protect candidates' privacy. Sitting chancellors, presidents, provosts, and other leaders do not want their current appointments put in jeopardy and if there is a risk of doing so, many candidates will withdraw from the search. It is also important to maintain the integrity of the search process by freeing it from outside influence that is not consistent with the goals and objectives of the Board and system. For these reasons, confidentiality needs to be maintained, but in doing so it is incumbent on the Board and President—with support from the search firm—to seek stakeholder and community input during the process and to ensure that the final candidate is welcomed to UC and the campus.

Figure 7a. Degree of satisfaction in the deliberative process and notification system (Question 22)



Even though more than half indicated that they were satisfied with both of these aspects, the levels of satisfaction were starker when looking across racial groups and search committee roles. For instance, even though over two-thirds of White respondents were satisfied or very satisfied with the search committee's deliberative process, fewer than half of their non-White search committee members felt this way (see Figure 7b). Worth noting is that over one-third of non-White respondents expressed dissatisfaction with the search committee process.

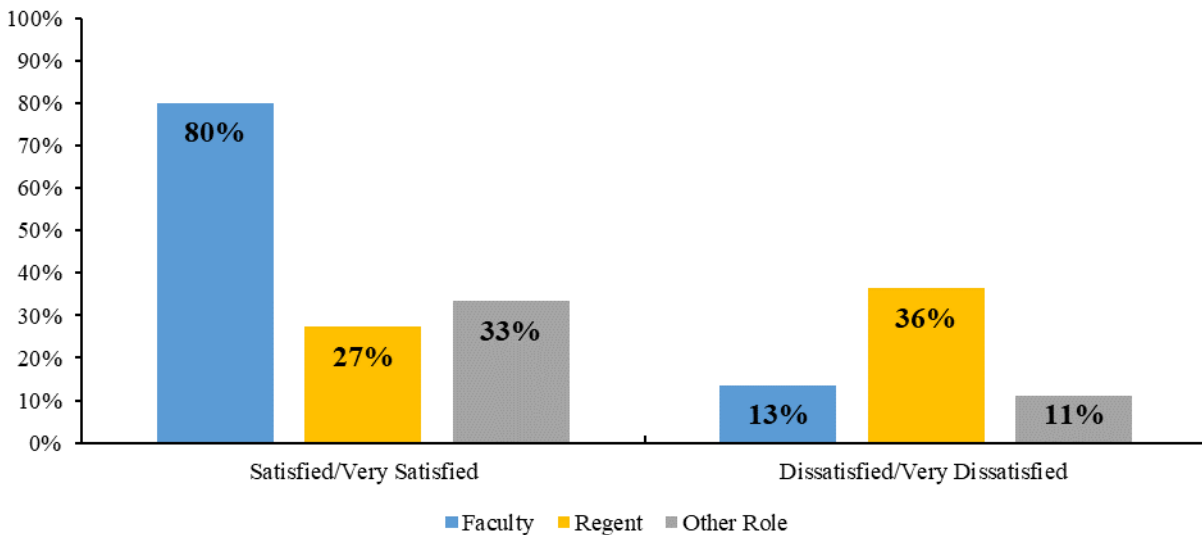
Figure 7b. Degree of satisfaction in the deliberative process, by racial group (Question 22)



Regarding the notification system, the vast majority of faculty were satisfied with the way in which they were notified of the final candidate (see Figure 7c). This is in stark contrast to the levels of satisfaction of the Regents, where only one-quarter expressed this same sentiment. There were more Regents who were dissatisfied with the notification process than there were who were satisfied.

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Figure 7c. The degree of satisfaction in the process used to notify the search committee about the final candidate, by search committee role (Question 22)



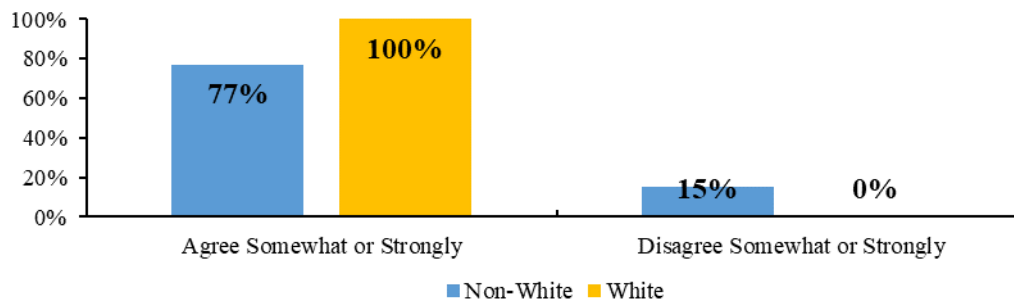
## 2. Search committee preparation and training

Before engaging in the work, the search committee should be given a full orientation and training. The search committee should receive, at a minimum, full briefing and training on the process, timeline and their role as an advisory body to the President; the importance of job description, candidate attributes, and position criteria; the use of candidate assessment criteria and interview protocols; the roles and responsibilities of the search firm; implicit and affinity biases; the importance of stakeholder and campus insight; and the responsibility of the search committee as a group to find the best possible chancellor. This first step will not only improve the process but ensure that search committee members are fully engaged and committed to their work.

Among search committee participants, the perception of preparation and training varied by race. Nearly all survey respondents indicated that they were well informed about the process, their responsibilities, and the timeline for the search. This was true regardless of race, gender, or role on the search committee. However, while 100 percent of White respondents felt that they were kept informed of the process, only three-quarters of non-White respondents felt this way (see Figure 8).

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Figure 8. Agreement with being kept informed of the search process, by race (Question 11)



While survey findings revealed general agreement with being kept well informed, interviewees indicated that they were confused and needed more guidance on the process in detail, as well as on their roles and responsibilities in working with the search firm. Specifically, one former search committee member stated that they needed someone to step in and say, “Here’s what we want to get and here’s how we are going to do it.” Interviewees also commented that they wanted to be better prepared, especially related to expectations from the President and Board of Regents and their participation in campus visits and meetings.

### ***3. Candidate qualifications and job description***

Creating the job description is a vital step not only to ensure that UC attracts and recruits the best candidates, but also to highlight the specific competencies for which the search committee should be looking. The job description enables search committee members to have an understanding of the broad definition of the job in order to identify the right candidates and empowers the search firm to engage and recruit a pool of qualified applicants.

Respondents and interviewees believe that they would have benefitted from a better understanding of the actual job of a campus chancellor and, in particular, a description customized for the campus. As one interviewee noted, “We need to help candidates understand the job—and that is more than shared governance with faculty.” Specifically, several interviewees recommended that the job description and desired qualifications should cast a wide net to attract and recruit candidates with a variety of leadership experiences, including, but not limited to, shared governance.

Leadership and the ability to motivate others ranked high among survey respondents and interviewees as attributes they believed to be most important in a campus chancellor. Two other top characteristics among the entire survey sample included a leader who is a visionary and someone who understands and appreciates shared governance. Only faculty respondents had different and consistent priorities—candidates who are committed to the academic enterprise, to the record of accomplishment in an academic setting, and also to shared governance.

While the faculty prefer candidates with strong academic backgrounds, campus chancellors also need to be managers, fundraisers, politicians, advocates, community leaders, and more. One interviewee noted that the “...chancellor should be strategist, leader, having a long history in academia is not an absolute.” Another stated that “...There is need for some academic background for chancellors; however, there are non-traditional candidates that could succeed on the campus as well if given the chance.” Specifically, multiple survey respondents and

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interviewees suggested the need for UC to take risks and seek out new types of leaders, ones that have different experiences and backgrounds, not solely academic. UC has looked for leadership in the same groups every time, yet successful leadership does not have to only be based on academic achievement. The key to attracting, recruiting, and hiring these new types of leaders is showing that they will be provided with support and mentorship in order to retain them.

Among UC's values is the importance of diversity at all levels of the University. However, despite this emphasis on diversity, only two survey respondents selected this as the most important characteristic in a campus chancellor. Furthermore, only two other participants listed it as their second priority. Additional suggestions for important attributes included the ability to relate to other stakeholders and an appreciation for the breadth of the University.

#### ***4. Candidate screening***

The initial screening of candidates is the first step to narrowing the pool of potential applicants and making the future process more manageable. This first step also provides the search committee with an opportunity to ensure that a diverse roster of candidates moves to the next round and is included in potential interviews.

The initial screening of candidates was one step in the search process where there was significant confusion, dissatisfaction, and division among former search committee members. The current policy calls for the five faculty members, working with the President or President's designee, to submit to the search committee for evaluation their list of promising candidates.

There is the general consensus that faculty should play an important role in the process, yet allowing them to conduct the initial screening is problematic for multiple reasons. First, interviewees noted that the faculty prioritize academic performance and credentials above other important skills that a campus chancellor needs. Since faculty place so much emphasis on academics, one interviewee stated that this immediately creates "misalignment between the candidates and what the campus needs and wants."

A majority of interviewees also noted the lack of transparency of the work of the faculty subcommittee as another significant concern. As the narrowed list was presented to the full search committee, members did not understand how the candidates were screened or why these particular candidates were brought forward for further review and others were not. The criteria used by the faculty subcommittee in selecting candidates were not clear and not disclosed to the rest of the search committee, nor to the broader community. Similarly, some interviewees reported that faculty spent significant time researching backgrounds, credentials, and experiences of applicants who might not even be interested or willing to be candidates for the position, which was not only inefficient, but not useful for the overall process or to the search committee as a whole.

Finally, former search committee members and search firms noted that the initial screening process often contributed to the University's inability to attract and recruit candidates that reflect the commitment to diversity. Several participants indicated that there was a sense that it would be difficult to attract and recruit nontraditional and diverse candidates because of the faculty role in screening applicants, noting that, "...we had to fight to get more nontraditional candidates to get into the pool during the full committee meeting."



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## 5. *Campus visits and forums*

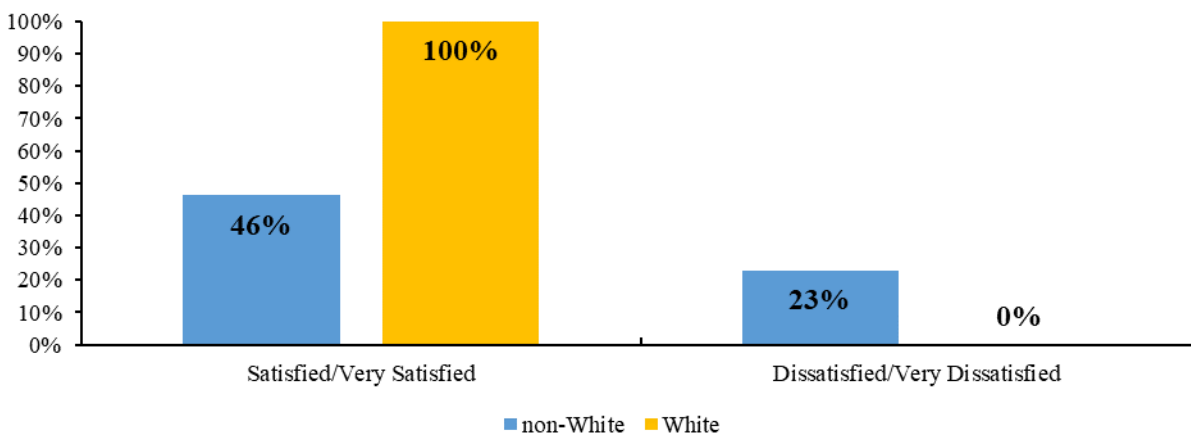
Selecting a new chancellor is a significant process, and interviewees highlighted the importance of “getting the pulse of the community.” One way UC has engaged in this practice is through campus visits and town halls, which often follow the development of the documents that drive the search. Some interviewees suggested that town halls were necessary but expressed the sentiment that these forums do not really provide in-depth information, nor do they account for all the voices and perspectives in the community. To remedy this, several interviewees suggested that the full search committee also hold individual meetings with key stakeholder groups (e.g., community members, campus staff, students, etc.) to garner more information. It is worth noting that recent searches have increased such outreach efforts.

Interviewees believed that stakeholder meetings, campus visits, town halls, and other forums to engage the campus and broader community increase transparency, which ultimately leads to commitment and buy-in from the community. Inclusion of the campus and broader community gives the search committee and the University as a whole a better sense about the needs and hopes for the future, as well as opportunities and challenges ahead.

## 6. *Search outcomes*

The outcome of any search results in arriving at the final candidate(s) for review and hiring. Despite concerns about the development of the candidate pool developed by the subcommittee and about the perceptions related to UC’s commitment to diversity, former search committee members were satisfied in general with both the candidate pool for review, as well as that for subsequent interviews. Eight in ten participants indicated that they were satisfied or very satisfied with both pools. However, there were some varying levels of satisfaction, primarily among different racial groups. Most prominent was the difference between non-White and White respondents in the initial candidate pool for review (see Figure 9).

Figure 9. Degree of satisfaction in the initial candidate pool for review, by race (Question 25)



While *all* White respondents were satisfied or very satisfied with the initial candidate pool, fewer than half of non-White respondents felt the same level of satisfaction. Further, nearly one-quarter of non-White respondents were dissatisfied or very dissatisfied.

While broad satisfaction with search outcomes was present in both the survey and former search committee members, interviewees still raised concerns that the actual demographic makeup of

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the search committees was not representative of the diversity of UC's student body or of the state. Specifically, one interviewee noted, "You cannot get diversity from a homogenous group." This notion was further supported with a comment that "you need more than one diverse committee member to really get results." This statement highlights the importance of each step in the search process and the need to have *many* instances of diversity, broadly construed, throughout the search process to meet UC's high standards to employ the best process to select the best person for the chancellor position.

Additionally, several interviewees inside and outside the system noted the importance of supporting newly hired chancellors, especially those who come from diverse backgrounds and experiences. In many cases there was a concern that UC does not help these leaders be successful as they move through the UC culture. One candidate noted the lack of respect or of a sense of welcome starting from the interview process, and a search firm shared that nontraditional, qualified candidates had left the process noting that, after their experience, they were not interested in joining UC now or in the future.

The CORO report reinforces the views of interviewees:

"Mentorship is seen as key to preventing both isolation and feelings of imposter syndrome among URM leaders and would-be leaders. Chan (2017) cites a program at UC Berkeley in which senior executive administrators help advocate for those looking to advance to higher positions at the University."

"The small number of underrepresented minorities (URM) in positions of academic leadership can often leave these leaders feeling isolated among their mostly white fellow administrators. A qualitative study finds that adjustment issues, institutional factors, and career dynamics are barriers to career success for URM academic leaders. (Gardner, Barrett, and Pearson 2014)."

Finally, current Regents Policy 7102 specifies that "The President of the University will conduct a continuous search for promising candidates for Chancellorships." However, it should be noted that in order to attract women and people of color to UC leadership positions in the future, Board members, the President, executive leaders, and campus chancellors *all* need to be vigilant in their succession planning and exploring their networks for future candidates. A new search should not be a perfunctory, one-time process, reliant only on the President; effective recruitment will require a more comprehensive engagement strategy that is both ongoing and purposeful.

### **III. RECOMMENDATIONS**

The working group recommends the following changes to improve transparency, accountability, delineation of roles and responsibilities, and administrative practices in UC's chancellor search and selection process.

#### **A. Policy**

To improve *policies* governing the search process, the working group makes the following recommendations:

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**1. Revise Regents Policy to articulate the roles and responsibilities of the Regents as they pertain to working in partnership with the President to recruit and select campus chancellors.**

The Board is ultimately responsible for the success of the University, including the quality of its leadership. As an active partner with the President, the Board can assure that each search reflects the best work of all involved and, with a clear sense of purpose, ensure that leadership reflects diversity in gender and race as well as experience. More specifically:

- Specify that the President will meet with the Regent members of the search committee prior to retention of the search firm and appointment of other members of the search committee to discuss the search process.
- Specify that following the process of the full search committee, the President shall meet and discuss candidates with the Regent members and then propose a candidate for approval by Regent members of the search committee prior to recommendation to the full Board. The President shall notify all non-Regent members of the search committee of the recommendation at an appropriate time.

**2. Revise Regents Policy to invite faculty and other stakeholders to submit any number of promising candidates to the committee for consideration.**

Current policy does not reflect current practices nor the need for the entire search committee to collectively engage a broader stakeholder network in the process of identifying the most promising chancellors.

**3. Revise Regents Policy 7102 to specify a minimum number of nominees from identified stakeholder groups from which the President may appoint to the search committee to ensure that the search committee has the best balance in the skills, background, and experiences of committee members and to ensure that the search committee represents the diversity of the UC community.**

Increasing the number of nominees will help to ensure a well-balanced and diverse search committee. Nominating groups should ensure that nominees have the time and are willing to serve.

**4. Revise Regents Policy 7102 to specify that the President will ensure that the University has a continuous, robust process for identifying promising candidates.**

As stated above, in order to attract women and people of color to UC leadership positions in the future, Board members, the President, executive leaders, and campus chancellors *all* need to be vigilant in their succession planning and exploring their networks for future candidates. Effective recruitment will require a comprehensive engagement strategy that is both ongoing and purposeful. The President should implement and oversee this process for identifying promising candidates.

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## B. Process

To improve the *process*, the working group makes the following pre-search, during search, and post-search recommendations:

### *Pre-search/search preparation:*

**5. Request that the Governance Committee periodically approve the Request for Proposals (RFP) used to qualify search firms which demonstrate a high level of commitment to diversity.**

The Governance Committee should review and approve requests for proposals to qualify search firms. Reviews of RFPs should include specific information on success that the firms have had in placing diverse candidates, the firm's commitment to diversity within its own executive ranks, and the requirement that search firms illustrate specific diversity, equity, and inclusion "best practices" in the search process.

**6. Periodically rotate among approved search firms for active searches in order to take full advantage of search firms' networks and practices.**

Revise administrative practices so that UC rotates search firms from among those on the pre-qualified list; in this way the University can benefit from different candidate pools and networks, varying perspectives and approaches, and various firms' experience and success in recruiting and placing qualified selection of candidates.

Consider using a process similar to that used in selecting auditors, through which the University can eliminate the perception that one firm has a monopoly on UC chancellor searches. Employ consistent rating criteria for equity, diversity, and inclusion in the review and selection of a search firm.

The President should consult with the Chair of the Board on the final search firm selected from among those qualified under the master agreement for the system. Final selection should include a review of how the firm has demonstrated its commitment to — and success in obtaining — a diverse selection of qualified candidates placed into leadership positions.

**7. Request that the Governance Committee develop and periodically review job expectations for all chancellors, and request that the full Board approve these and any changes proposed thereof.**

The job expectations will apply to all chancellor searches, regardless of campus. Campus-specific criteria, developed by the search committee, may augment this list. (See Recommendation 11 below.) The job expectations should reflect the consensus of the full Board.

**8. Provide orientation and training for the search committee members before they begin their work, including, but not limited to, stakeholder engagement, implicit bias, job**

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**description and qualities required of a chancellor, candidate criteria development and use, schedule and timeline (including campus visits), and interview protocols and confidentiality. Provide clarity on the roles and responsibilities of all committee members, including their contribution to the search process. Provide training on how to evaluate candidates according to job criteria.**

Before the search committee begins its work or during the first meeting of the search committee, provide orientation and training that includes, but is not limited to:

- Roles and responsibilities of all committee members
- Stakeholder engagement
- Implicit bias
- Job description
- Candidate criteria development and use
- Schedule and timelines (including campus visits)
- Interview protocols, and
- Confidentiality.

The search firm should be tasked with providing this training, in consultation with the President and President's staff.

***During search:***

- 9. The President should consult with the full search committee on the management of meetings, including but not limited to the process the President will use to ensure that all committee members' perspectives are considered.**

All search committee members have been selected to provide their expertise and insight into the process, and yet interviewees often stated that there were many occasions where one group or another dominated the process. The President, with the support of the search firm, should manage the process, meetings, and expectations to make sure all perspectives are heard and each search committee member can meaningfully contribute to the search process.

- 10. Launch the search process with a joint visit of the University President and Chair of the Board of Regents to the campus to set the tone for the search and affirm commitment to a shared vision for the future of the campus and expectations of campus chancellors. These visits will also outline the search process, seek support from stakeholders to find the best candidates, and establish priorities of the search, which include the importance of inclusivity, transparency, and commitment to diversity.**

By initiating the process with a joint visit, the President and the Chair of the Board set the tone for the commitment to finding highly qualified innovative leaders for the UC system and the importance of the campus to the system. Through this initial visit, leaders can clearly communicate the search process, timeline, and engagement of stakeholder groups, as well as highlight the importance of meaningful input from the community about the future of the campus.

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**11. Engage in broad outreach to community and affinity groups, local government and business leaders, and educational partners to identify a candidate pool that reflects the needs, goals, opportunities, and demographics of the campus.**

The search committee should hold specific meetings with campus groups, such as ethnic faculty, staff, student groups, and other affinity groups to get their insight and request their help in recruiting candidates. Meetings with community members, such as community-based organizations, local government, business leaders, and other higher education segments would additionally support recruiting efforts by identifying the needs of the community as well as potential candidates.

**12. Engage the full search committee to establish campus-specific job criteria that may augment the job expectations approved by the Governance Committee and full Board to develop the job description and create a campus profile or Challenges and Opportunities paper based on input from other stakeholder groups. Include abilities, experiences, and skills that the chancellor needs to lead the campus in the criteria for consideration, which will then be used by the search firm to screen candidates for possible interview by the search committee. These criteria will also be utilized by the search committee during the candidate assessment process.**

The responsibility for the job description, candidate attributes, and Challenges and Opportunities paper should be a collective one and should represent input from stakeholders and the campus community. The full search committee — rather than only the faculty subcommittee — with the support of human resources staff and the search firm, should develop these documents that guide the recruitment and selection of the new chancellor.

Criteria for campus chancellors should include recognition of previous experiences that would contribute to a successful chancellor. Special consideration should be given to criteria that meet the needs of the individual campus and would allow the chancellor to use previous experiences to advance the campus.

Recognizing work that contributes to access and opportunity can expand the range of applicants for chancellor positions. Such criteria can include work that: (a) meets the needs of students from underrepresented groups, (b) contributes to the advancement of equitable access and diversity, (c) supports professional advancement of individuals in underrepresented groups, and (d) contributes to furthering diversity and equal opportunity within the University through such activities as recruitment, retention, and mentoring of scholars and students of diverse backgrounds.

**13. Utilize the selected search firm to conduct the initial screening of applicants.**

After the search committee develops the job description and Challenges and Opportunities paper, the search firm should conduct the initial screening of candidates for consideration by the full search committee for initial interview. Rather than expending precious hours of faculty time researching backgrounds, credentials, and experiences of applicants who may not be interested or willing to become candidates, faculty screening should be targeted to individuals who are most viable and interested in becoming candidates for the chancellor

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position. The search firm should initially screen all applicants who are recommended by stakeholders.

**14. Provide regular updates to the full Board in closed session regarding active searches—from initial application through the interview phase.**

Search firms should report to the full search committee throughout the entire process, including progress on developing applicant pools, screening candidates, and candidate recruitment. Additionally, either the search committee or the President should periodically report this information to the full Board. To ensure that recruitment and advancement of a highly qualified, diverse pool of candidates is proceeding, particular attention should be given to the inclusion of diversity metrics in these progress reports, such as the diversity of candidates who (a) the firm contacted, (b) applied for the position, (c) were included in the hiring pool, and (d) advanced to the interview phase.

***Post-search:***

**15. Provide an annual report to the Board of Regents on the diversity of campus and systemwide executive leadership positions from initial applications through the interview phase and include candidate feedback on an anonymous basis from those who do not accept offers or who withdrew their candidacy prior to closure of the search.**

Systemwide human resources should prepare an annual report to the Board of Regents for all executive recruitments. This report should include, at a minimum, diversity of candidate pools, initial interview pools, interviewed candidates, candidates withdrawn, offers accepted or rejected and, if possible, reason(s) for not accepting the position. The data in the report should be used internally to identify trends and to inform approaches in future recruitments, and future reports should describe how trend data was used to inform actions. This report can also be used to identify if recommendations on diversity within the candidate pools are leading to successful search outcomes at both the campus and system levels.

**16. Expand existing, or establish new, formal executive leadership development programs to encourage and help prepare current UC administrators and faculty to compete and succeed in leadership roles.**

Ensure that programs are both viewed and utilized as viable leadership pipelines to help UC develop future leaders who understand the mission of the system and its culture and who are knowledgeable of the needs of UC students and the state.

Strategies to identify and encourage more UC personnel to consider chancellor positions may include mentoring by chancellors, provosts, and other campus leaders and encouraging them to become more involved in campus and system initiatives, projects, and committees.

**17. Develop an on-boarding process to ensure that all newly appointed chancellors and other leaders at UC feel supported, welcomed, and valued as new members of the University.**

While this recommendation should apply to new hires generally, in this context it is important to set the example of how UC cultivates strong leaders and a strong culture of

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inclusion, which will help in future recruitment and retention efforts. Examples of onboarding strategies include “buddy systems,” mentoring from peers, and formal mentoring programs, as well as advanced leadership training.

#### **IV. CONCLUSIONS**

The importance of the chancellor’s role in the success of the University cannot be understated. Chancellors impact the future success of their campuses, but they also contribute to the rich culture and success of sister campuses and the broader University system.

The complexity of the chancellor’s role also cannot be understated. Chancellors must be responsive to, and work in partnership with, a wide range of constituencies under complex governance structures. Chancellors also have tremendous responsibilities in ensuring that the tripartite mission of the University is met, and must work to advance this mission regardless of economic conditions or other emergencies.

As stated at the outset, this review of the chancellor search and selection process was undertaken to affirm the best process to select the best person for the chancellor position. This review and its recommendations also provided an opportunity for UC to redouble its commitment to diversity, equity, and inclusion enshrined in its policies.

In order to obtain maximum benefit from a robust search process, UC must update its policies and practices to reflect better collaboration among key decision makers and be open to considering a broad range of attributes that are pre-conditions for successful leadership of a campus. It must enhance and better define the roles, responsibilities, and opportunities for all involved in the search, internally and externally, as well as formally and informally. Finally, UC must be intentional in its goal to be inclusive and equitable through every step of the process.

In the hiring of its chancellors, UC is uniquely positioned to lead the nation in establishing inclusive campuses, with leaders who can address the challenges of higher education in the 21<sup>st</sup> century. The work of the search committee represents an opportunity to engage the broader community and shape the future direction of the University. Moving forward, these recommendations will help to ensure that UC reflects the values embodied in its mission for the benefit of its students, staff, and faculty.

#### **V. APPENDICES**

##### **A. Relevant Regents Policies**

##### **B. Amendments to Regents Policy 7102**

##### **C. Survey Instrument**

##### **D. Interview Protocols**



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## A. APPENDIX A – RELEVANT REGENTS POLICIES

### **Regents Policy 4400: Policy on University of California Diversity Statement**

*Adopted September 20, 2007*

*Amended September 16, 2010*

*RECOMMENDED TO THE UNIVERSITY OF CALIFORNIA BY THE ACADEMIC SENATE OF THE UNIVERSITY OF CALIFORNIA*

*Adopted by the Assembly of the Academic Senate May 10, 2006 Endorsed by the President of the University of California June 30, 2006*

*Adopted as Amended by the Assembly of the Academic Senate April 22, 2009*

*Endorsed as Amended by the President of the University of California August 17, 2010*

The diversity of the people of California has been the source of innovative ideas and creative accomplishments throughout the state's history into the present. Diversity – a defining feature of California's past, present, and future – refers to the variety of personal experiences, values, and worldviews that arise from differences of culture and circumstance. Such differences include race, ethnicity, gender, age, religion, language, abilities/disabilities, sexual orientation, gender identity, socioeconomic status, and geographic region, and more.

Because the core mission of the University of California is to serve the interests of the State of California, it must seek to achieve diversity among its student bodies and among its employees. The State of California has a compelling interest in making sure that people from all backgrounds perceive that access to the University is possible for talented students, staff, and faculty from all groups. The knowledge that the University of California is open to qualified students from all groups, and thus serves all parts of the community equitably, helps sustain the social fabric of the State.

Diversity should also be integral to the University's achievement of excellence. Diversity can enhance the ability of the University to accomplish its academic mission. Diversity aims to broaden and deepen both the educational experience and the scholarly environment, as students and faculty learn to interact effectively with each other, preparing them to participate in an increasingly complex and pluralistic society. Ideas, and practices based on those ideas, can be made richer by the process of being born and nurtured in a diverse community. The pluralistic university can model a process of proposing and testing ideas through respectful, civil communication. Educational excellence that truly incorporates diversity thus can promote mutual respect and make possible the full, effective use of the talents and abilities of all to foster innovation and train future leadership.

Therefore, the University of California renews its commitment to the full realization of its historic promise to recognize and nurture merit, talent, and achievement by supporting diversity and equal opportunity in its education, services, and administration, as well as research and creative activity. The University particularly acknowledges the acute need to remove barriers to

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the recruitment, retention, and advancement of talented students, faculty, and staff from historically excluded populations who are currently underrepresented.

**Regents Policy 7102: Policy on Appointment of Chancellors**

*Approved May 15, 1981*

*Amended January 2008 and June 26, 2018\**

1. The President of the University will conduct a continuous search for promising candidates for Chancellorships. This process is included as an important complement to the systematic nationwide search which will be undertaken each time a vacancy occurs.
2. When a vacancy occurs or is imminent, a committee will be appointed to advise the President of the University. The Committee will consist of five Regents appointed by the Chairman of the Board, as well as the Chairman of the Board and the President of the University, who serve ex-officio. Additional committee members will be selected as follows: five faculty members appointed by the President of the University - one shall be either the Chair or Vice Chair of the Academic Council, one shall be a faculty member from a campus other than the one that is the subject of the search, chosen from a panel submitted by the Academic Senate's Universitywide Committee on Committees, and three shall be campus faculty members chosen from a panel submitted by the campus Academic Senate Committee on Committees. A graduate and an undergraduate student appointed by the respective graduate and undergraduate student associations of the campus, an alumni representative appointed by the alumni association of the campus, a Foundation representative chosen by the President from a panel of names submitted by the Campus Foundation, and a staff employee representative of the campus selected by the Campus Staff Assembly shall be invited to attend all meetings of the Committee with full participation in discussion and debate. The President of the University will convene the Committee.
3. The five faculty members on the Committee, working with the President of the University or the President's designee will submit to the Committee for evaluation not fewer than five promising candidates. The Committee will evaluate these nominations and may consider or suggest other names. It may interview candidates. It will solicit the opinions of other interested groups in whatever manner it considers appropriate.
4. Both the committee and the President shall be mindful of the University's firm commitment to diversity in the employment of women and minorities in seeking out the most qualified candidates.
5. After the Committee has completed its evaluations and advised the President of the University, the President will make his or her recommendation to The Regents for consideration and approval.

*\*Technical Amendments made by the Secretary and Chief of Staff to the Regents per Policy 1000*

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## B. APPENDIX B – AMENDMENTS TO REGENTS POLICY 7102

### Regents Policy 7102 - Policy on Appointment of Chancellors

*Approved May 15, 1981*

*Amended January 2008 and June 26, 2018*

#### **POLICY SUMMARY/BACKGROUND**

The Policy on Appointment of Chancellors facilitates the selection of candidates for Chancellorships by outlining the selection process for search advisory committee membership and the roles and responsibilities of the committee members.

#### **POLICY TEXT**

1. The President of the University will ~~conduct a continuous search for promising candidates for Chancellorships~~ ensure that the University has a continuous robust process for identifying promising candidates. This process is included as an important complement to the systematic nationwide search which will be undertaken each time a vacancy occurs.
2. When a vacancy occurs or is imminent, the Board and the President each has a role in the appointment of a new chancellor. A search advisory committee will be appointed formed to advise the President of the University. the appointment.

The Committee will consist of:

- The President of the University, who will serve ex-officio;
- The Chair of the Board, who will serve ex-officio;
- Five ~~five~~ Regents appointed by the Chair of the Board;

~~as well as the Chair of the Board and the President of the University, who serve ex-officio.~~

~~Additional committee members will be selected as follows:~~

- Five ~~five~~ faculty members appointed by the President of the University;
  - one shall be either the Chair or Vice Chair of the Academic Council;
  - one shall be a faculty member from a campus other than the one that is the subject of the search, chosen from a panel of no less than three nominees submitted by the Academic Senate's Universitywide Committee on Committees; and
  - three shall be campus faculty members chosen from a panel of no less than six nominees submitted by the campus Academic Senate Committee on Committees.

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- ~~A~~a graduate and an undergraduate student appointed by the respective graduate and undergraduate student associations of the campus;;
  - ~~An~~an alumni representative appointed by the alumni association of the campus;;
  - ~~A~~ a Foundation representative chosen by the President from a panel of no less than three names submitted by the Campus Foundation; and
  - ~~A~~a staff employee representative of the campus-~~selected~~ chosen by the President from a panel of no less than three nominees submitted by the Campus Staff Assembly ~~shall be invited to attend all meetings of the Committee with full participation in discussion and debate. The President of the University will convene the Committee.~~

3. The President of the University will meet with the Regent members of the Committee prior to the retention of the search firm and appointment of other members of the Committee to discuss the search process. The President will convene the Committee and ensure that the Committee has a strong balance of skills, background, and experience, and represents the diversity of the University community.
3. 4. ~~The five faculty members on the Committee, working with the President of the University or the President's designee will submit to the Committee for evaluation not fewer than five promising candidates. The Committee shall solicit the opinions of a wide variety of groups in the search for candidates. The Committee shall invite faculty and other university stakeholders to submit any number of promising candidates to the Committee for consideration. The Committee will evaluate these nominations and may consider or suggest other names. It may shall interview candidates. It will solicit the opinions of other interested groups in whatever manner it considers appropriate.~~
4. 5. ~~Both the~~ The Committee and the President shall be mindful of the University's firm commitment to diversity in the employment of women and minorities in seeking out the most qualified candidates.
5. 6. ~~After the Committee has completed its evaluations process, and advised the President of the University, the President shall meet and discuss candidates with the Regent members of the Committee and then propose a candidate for approval by the Regent members of the Committee prior to making the President will make his or her recommendation to the Board of Regents for consideration and approval. The President shall notify all non-Regent members of the Committee of the recommendation at an appropriate time.~~

### **NO RIGHT OF ACTION**

This policy is not intended to, and does not, create any right or benefit, substantive or procedural, enforceable at law or in equity by any party against the University of California or its Board of Regents, individual Regents, officers, employees, or agents.

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## C. APPENDIX C – SURVEY INSTRUMENT

### University of California Campus Chancellor Search Process

#### Survey Instrument

##### Purpose of the Survey

The University of California’s ten campuses are among the most preeminent public research universities in the world. The outreach, recruitment and selection of a campus Chancellor are integral to ensuring that the University fulfills its teaching, research and service missions to the greatest extent possible.

Because of its importance to and impact on the University, the Regents have undertaken a review of the Chancellor search process to ensure the best possible process is utilized. You are asked to complete this survey as part of an evaluation of the Chancellor search process. The intent is to understand the current Chancellor search process, what works well and what could be improved. The themes include the search process, use of firms, search committees and members, and the overall campus and university community.

##### Procedures

To participate, please complete and submit the following survey. Most respondents will complete the questionnaire in about 20 minutes, although individual progress will vary by how quickly you move through the questions. The survey is voluntary and you may decline to complete it in its entirety, or omit responses to any specific questions.

##### Confidentiality

Please note that your responses will be used to understand and improve the process for the Chancellor searches and will be strictly confidential. Any information that is obtained in connection with this survey and that can be identified with you will remain confidential. Findings from this survey will be presented in aggregate form and all identifying information will be removed from the final analyses.

##### Introduction Questions

1. Name (*open*)
2. Are you: (*Mark all that apply*)
  - a. American Indian or Alaska Native
    - i. Tribal affiliation: \_\_\_\_\_
  - b. Asian
    - i. Asian Indian
    - ii. Chinese
    - iii. Filipina/o/x
    - iv. Japanese
    - v. Korean
    - vi. Vietnamese
    - vii. Other Asian
  - c. Black or African American

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- d. Native Hawaiian or Other Pacific Islander
    - i. Native Hawaiian
    - ii. Guamanian or Chamorro
    - iii. Samoan
    - iv. Other Pacific Islander
  - e. White
  - f. Hispanic or Latinx
    - i. Mexican
    - ii. Puerto Rican
    - iii. Cuban
    - iv. Other Hispanic or Latinx
  - g. Other: \_\_\_\_\_
3. What is your gender identity?
- a. Female
  - b. Male
  - c. Trans Female/Trans Woman
  - d. Trans Male/Trans Man
  - e. Genderqueer or Nonbinary Gender
  - f. Different Identity (*open*)
4. What is your age?
- a. 18-24 years
  - b. 25-34 years
  - c. 35-44 years
  - d. 45-54 years
  - e. 55-64 years
  - f. 65 or older
5. Are you a UC employee? (*yes, no*)  
SKIP LOGIC: if (*yes*), where do you work? (*open*)  
SKIP LOGIC: if (*no*), what is your organizational or institutional affiliation? (*open*)
6. Title (*open*)
7. Role in search
- a. Member of search committee
  - b. Part of campus-based group
  - c. Part of system-based group
  - d. Part of community-based group
  - e. No formal role
  - f. Other \_\_\_\_\_

### Theme #1: Process

- 1. How did you find out about the Chancellor search process?
  - a. Email
  - b. Flyer

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- c. Announcement
  - d. In-person
  - e. Phone call
  - f. Word-of-mouth
  - g. Other: \_\_\_\_\_

- 2. Did you see marketing/advertising about the position on social media? (*yes, no*)
- 3. Did you see marketing/advertising about the position in publications? (*yes, no*)
- 4. Indicate the extent to which you agree with the following statements. (*Strongly Agree, Agree Somewhat, Disagree Somewhat, Strongly Disagree, Can't Rate/Don't Know*)
  - a. I had adequate information about the search process.
  - b. I had adequate information about my role or responsibilities in the search process.
  - c. I had adequate information about the timeline for the search
  - d. I was kept informed of the process of the search along the way.
  - e. My input was taken into account
- 5. Do you believe that the job description used for the campus search(es) was relevant and reflected the needs of the campus and general community? (*yes, no*)  
SKIP LOGIC: if (*no*), why not? How could it be improved? (*open*)
- 6. Were you asked about your thoughts regarding the important attributes for the next Chancellor? (*yes, no*)
- 7. Indicate the extent to which you agree with the following statements: (*Strongly Agree, Agree Somewhat, Disagree Somewhat, Strongly Disagree, Can't Rate/Don't Know*)
  - a. The current search process uses committee members' time effectively.
  - b. The current search process uses committee members' expertise effectively.
  - c. The broader community was directly involved in the chancellor search process.
  - d. The search process is transparent.
  - e. The search process is efficient.
- 8. Indicate the extent to which you agree with the following statements: (*Strongly Agree, Agree Somewhat, Disagree Somewhat, Strongly Disagree, Can't Rate/Don't Know*)
  - a. All the right stakeholders were given the chance to share their insight on the needs of the campus to inform future leadership.
  - b. The search committee members were demographically representative of the campus and its community.
- 9. Do you think there should be more **campus** stakeholders involved in the search process? (*yes, no*)  
SKIP LOGIC: if (*yes*), who should be included and how? (*open*)

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10. Do you think there should be more **community** stakeholders involved in the search process? (*yes, no, don't know*)

SKIP LOGIC: if (*yes*), who should be included and how? (*open*)

11. Do we have the right people involved in the recruitment, outreach, and search for campus chancellors? (*yes, no, don't know*)

SKIP LOGIC: if (*no*), which perspective is missing? (*open*)

12. Were there perspectives, experiences or expertise that you felt were needed and not represented on the search committee? (*yes, no, don't know*)

SKIP LOGIC: if (*yes*), which perspectives, experiences, or expertise were missing? (*open*)

13. How important are each of the following in the **outreach** and **recruitment** of potential candidates? (*Essential, Very Important, Somewhat Important, Not Important*)

- a. The search firm
- b. Outside consultants
- c. UCOP
- d. Board of Regents
- e. Search committee
- f. Campus community

14. Please rate your satisfaction with the executive search firm that was engaged to assist with the search process, with regard to the following aspects: (*Very Satisfied, Satisfied, Neutral, Dissatisfied, Very Dissatisfied, Can't Rate/Don't Know*)

- a. Developing job description for campus search
- b. Developing the broadest list of qualified candidates
- c. Screening applicants
- d. Preparing search committee for campus visit
- e. Managing recruitment and outreach
- f. Recruiting demographically diverse candidates (e.g., gender, ethnicity, etc.)
- g. Recruiting diverse candidates according to experience and expertise
- h. Other \_\_\_\_\_

15. Please rate your satisfaction with \_\_\_\_\_. (*Very Satisfied, Satisfied, Neutral, Dissatisfied, Very Dissatisfied, Can't Rate/Don't Know*)

- a. The outreach and recruitment process used by the search committee.
- b. The interview process of the search committee.
- c. The deliberative process of the search committee.
- d. The process used to notify the search committee and external groups of the Chancellor selection.

16. Do you believe that this process helped us to identify the right candidates for this important job, given the uniqueness of each campus? (*yes, no*)

FOLLOW-UP: How could it be improved? (*open*)



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17. Other comments on the search **process**: (*open*)

**Theme #2: Results and Candidates**

1. Please rate your satisfaction with \_\_\_\_\_. (*Very Satisfied, Satisfied, Neutral, Dissatisfied, Very Dissatisfied, Can't Rate/Don't Know*)
  - a. The candidate pool for review
  - b. The candidate pool for interviews
  - c. The candidate who was hired
2. Has the candidate(s) hired for Chancellor searches that you've participated in met your expectations as a leader for UC? (*yes, no, not applicable*)  
SKIP LOGIC: if (*no*), why not? (*open*)
3. What would improve the likelihood of UC getting more diverse experiences and representative leadership for their campuses? (*open*)
4. Among the following competencies and attributes, please rank them, with "1" being highest, according to ones you feel are most important for a UC Chancellor. (*rank boxes*)
  - a. Leader and motivator
  - b. Research experience
  - c. Communication skills for both internal and external audiences
  - d. Record of accomplishment in an academic setting
  - e. Ability to work with a wide range of constituencies
  - f. Raise funds, garner donations, procure grants
  - g. Ability to lead strategic planning to manage change and improvement
  - h. Be a visionary
  - i. Understanding and appreciation of shared governance
  - j. Commitment to student and faculty ethnic, cultural, and socio-economic diversity
  - k. Have a terminal degree
  - l. Political knowledge and experience
  - m. Commitment to academic enterprise
  - n. Business management skills
  - o. Student-centered
  - p. Problem-solver
  - q. Ability to manage crisis
  - r. Other: \_\_\_\_\_
5. Are you aware of the Regents policy for Chancellor search? (*yes, no*)  
SKIP LOGIC: if (*yes*), are you satisfied with the current policy? (*yes, no*)  
SKIP LOGIC: if (*no*), why not, and how could it be improved? (*open*)
6. Other comments on **outreach**, **recruitment** and **selection** process of Chancellors: (*open*)

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## **D. APPENDIX D – INTERVIEW PROTOCOLS**

### **University of California Campus Chancellor Search Process**

#### **Interview Questions**

1. What has been your experience in the campus chancellor searches?
2. Based on your experience, do you believe there should be any changes in this process?
3. Do you believe that the current process for the selection of search committee members works or needs any changes?
4. Are there ways we might better engage campus stakeholders in the process?
  - a. If so, what are they?
5. Of the searches you've been involved in, what worked really well? What could be improved?
6. Was the Chancellor search process clear? Did you feel it was transparent?
  - a. If not, what would you have liked to have known/when?
  - b. What would you change?
7. Did you feel you were able to provide meaningful input?
  - a. Please describe.
  - b. What would you change about how committee members provide their input, if any?
8. Did you feel like the published criteria for the next Chancellor was helpful to the search?
  - a. Why or why not?
9. Did you feel like your input was taken into account?
  - a. If not, what could the search process include to better include your input?
10. How much time did you spend on the Chancellor search process?
  - a. Did you feel like your time was well spent?
  - b. What would you change about how you spent time?
11. Did you feel like you had access to adequate and relevant information during the Chancellor search process?
  - a. What would you change?
12. Were campus and statewide stakeholders adequately engaged in the process?
  - a. What would you change in this regard, if anything?

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13. Did you feel like the Chancellor search process included robust stakeholder outreach?
    - a. Are there any stakeholders you believe should be included who were not included?
  14. Were you satisfied with the work of the search firm?
    - a. Any observations or suggestions on how to better use them in the process?
  15. Was the campus and its community involved in the development of the criteria and job description that guide the search?
    - a. If so was that useful in getting the outcomes desired?
    - b. If not what would you change?
  16. Should there be a greater distinction between the role of campus-based stakeholders as compared to statewide constituencies in campus searches?
  17. Any other comments about the Chancellor search process that could be improved?

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## **Interview Questions for Search Firms**

What searches have you worked on for the University of California?

How were you selected to run the search?

Thinking back to these searches, from your perspective, what worked well and what could be improved? How long did the process take from start to finish?

What role did your office play versus what the internal HR group played?

Who developed the job description? Was it a generic job description?

Please describe how you approach ensuring and developing a diverse and qualified candidate pool?

What role did the faculty play in the search process? What about students and staff?

What role did the current incumbent play in the process?

Do you feel the outcome of these searches was successful? (eg obtained the right fit, diverse candidate, appropriate for that institution)

In contrast to other either public or private searches you conduct at this level, describe the differences? What are they main differences? How long from start to finish was the search? Who developed the position description?

How many people in your organization are working on a search like this?

How do you ensure confidentiality in the process?

Where most of the candidates that you presented for these types of searches actively looking for their next opportunity?

What has been your experience dealing with internal candidates that express an interest?

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## **Interview Questions for Comparator Institutions**

1. Describe your process when hiring Chancellors/Presidents
2. Do you use an exec search firm? If so, what has been your experiences with the search firms? What roles and responsibilities are they charged with? Were they effective in getting a qualified, diverse pool of candidates?
3. What search firms have you used? How do you select the firms? Can you share your RFP or other materials regarding the hiring of firms?
4. What role does your statewide academic senate/faculty play in the process as compared to campus-based faculty?
5. Describe the make-up of your search committees? How are they selected? What if any additions or changes are made per policy to ensure that the final committee make-up is diverse and reflective of different views?
6. What other key constituents are involved? (alumni, community, students, staff). How are they selected?
7. What are the demographics of your current leadership? How has this changed over time if at all? Does your leadership reflect the make-up of the state population and/or students?
8. What kinds of outreach and recruitment efforts are undertaken in the search process and by whom?
9. Does your institution have programs in place to develop future leaders from within the university? If so, can you share materials and results of such efforts?
10. Do you have other strategies to develop diverse campus leaders that we should be aware of?
11. Who makes the final decision about the candidates?
12. How long does your search process take from start to finish?
13. Have you been successful in selecting and appointing more diverse leadership? What do you attribute that to?
14. How are the job descriptions and announcements developed for the searches? Who develops them? Are they standard or are they specialized by campus?
15. Do campus and stakeholders have a role in developing these?
16. Please send a copy of your policy AND PROCEDURES.
17. Anything you would like to share that might help us understand your process and system? Or others you would recommend we reach out to as we do this work?